Chimont leatherZone

OCTOBER 2005 - NUMBER 1
PUBLISHED BY
CHIMONT INTERNATIONAL SPA - ITALY

NEWSLETTER FROM THE FUTURE OF TANNING

Chimotan Ax

Goodbye to imperfect leather

A new, simple solution to an old, annoying problem

Chimont International

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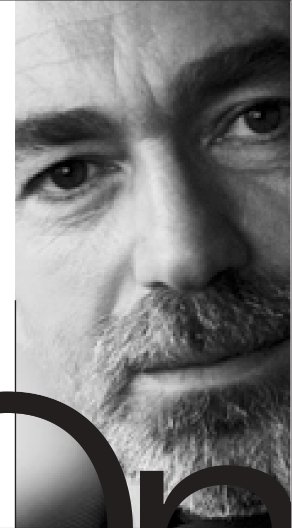
Chimont LeatherZone is a publication conceived and produced by **Chimont International Spa** and realized with the collaboration of important trade journals, with contributions from technicians and operators within the field of leather. For this issue in particular the editors thank Tecnologie Conciarie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



focusOn

Space for innovation

Should we assume the risks of innovation, or remain tied to the familiar? What will happen to the leather if we change a product or modify a production process? Will there really be economic advantages? These are the questions that a businessman often asks himself before making changes, even very small ones, in his own company.

Chimont International can provide very simple, reassuring answers: no risk, ease of use, better quality leather, greater competitiveness. This assurance comes from the results obtained from the advanced research that Chimont International has conducted and from the numerous positive experiences of all the clients who have had the courage to see for themselves the concrete advantages of genuine innovation.

In this issue of LeatherZone, a space for meeting and exchanging ideas for the leather industry, some of these products are presented.

Innovative solutions, created by Chimont International for the leather sector, and truly capable of adding value to leather. Welcome to LeatherZone.

Remo Petroselli
Chimont International Spa
General Manager

Chimotan AX: goodbye to imperfect leather

Chimont proposes a solution to the cases of "rocks" in leather

We call them "little rocks", all those insoluble salts that somehow remained trapped within the fibres of the leather, and that are found in many wet blue hides. They are small crystals of insoluble calcium, difficult to eliminate during the retanning phase, that strongly influence the characteristics of the finished item. In order to better understand their effects, we imagine them to be little rocks trapped in the fibrous tissue and while this term is not a very technical one, it is very descriptive.

THE PROBLEM

In the wet blue hides that we import, the presence of these salts is very inhomogeneous. Between one production lot and another we can either find a lot, or find none at all.

Among hides within an individual lot that contain these salts, depending on the thickness, we can find some hides that contain an elevated amount, and others with much smaller quantities.It is even possible that, among the various parts of a single hide, their distribution within the derma structure is completely different. Usually the most compact parts present higher concentrations than the spongier parts of the hide. Additionally, there are cases in which their presence is concentrated on the surface of the hide, just at the top of the grain, and as if this weren't enough, in an irregular manner.

THE CHARACTERISTICS

Regarding the characteristics of these salts, the principle aspects are the following:

- They are insoluble crystals, and it is not possible to remove them during the retanning phase.
- They are very hard, indeed, just like little rocks.
- They are practically inert and therefore they cannot chemically connect with the products that are used during the retanning phase.

Effectively, they physically occupy the space between the fibres and prevent the retanning products, from the colorants to the lubricants to be distributed homogeneously.

EFFECTS ON THE LEATHER

Direct effects

Let's imagine that we have "little rocks", hard ones, trapped in the derma tissue in a non-uniform way. Because of their physical characteristics, where they

are more concentrated, the leather is harder and flatter, giving some parts of the article a feeling similar to cardboard.

Further, because they are located physically between the fibres, those very fibres can't slide against themselves as they normally do, and so the elasticity of the finished article is reduced by their presence. As regards their effect on the flower, for that same reason it is more rigid and harder, and in consequence more fragile in bending and less resistant to mechanical actions.

Indirect effects

There are really many indirect effects, and in order to visualise them better we will again use the simile of "little rocks" that don't react to retanning products and take up space between the fibres.

Because retanning products are synthetic, vegetal or resinous and do not react with these salts, when they encounter them, finding the spaces between the fibres occupied, they tend to distribute themselves in the unoccupied areas. Their retanning action is therefore prevalent in those areas of the leather where there are no insoluble salts and they can form a chemical bond with the fibres. As a consequence, they will be less effective in the areas that are occupied by the "little rocks".

All of this will contribute to the non-uniformity of the fullness and structure of the leather.

The lubricants as well will tend to distribute themselves in the unoccupied areas of the leather. Thus the more compact areas, which already tend to become harder, will be even more so because of the presence of the "little rocks", in addition to the fact that the quantity of lubricants in those areas will be inferior. Further, since the spongier parts of the leather are those where the presence of insoluble calcium salts is lower, and since the oils will tend to go to unoccupied areas, we will also see the effect of an increase in the blowing of the grain in the flanks because an excess of lubricants will wind up in that very area. This will contribute to the non-uniformity of the softness and elasticity of the leather.

Finally, the colorants will not dye the calcium salts, leading to a non-uniformity of colour on the surface as will as in section. Further, since the calcium salts are white in colour, they will render all tones of color lighter and less brilliant.

In the cases where we want to make our finished articles water-repellent, and given the fact that all the salts present in the leather reduce resistance to water penetration, we can easily understand their effect on the final results: reduction of resistance to water penetration, but above all...non-uniformity of resistance from one area to the next within the same hide.

CONCLUSIONS

Whatever article is produced, in order to make it consistent and uniform it is necessary to eliminate the "little rocks" from within the leather.

THE SOLUTION

Only those who work directly with the processes of beam house and tanning can assure the production of wet blue hides that are absolutely free of these salts and can therefore ignore this problem. On the other hand, for those who acquire wet blue hides from various countries or from tanneries that cannot guarantee a consistent quality of production it is essential that the hides are specially washed before the retanning phase is begun.

This wash guarantees the total elimination of the carbonates that are present without compromising the structure of the leather. The results will be immediately evident and there are really many advantages:

Raw leather

– The ability to acquire wet blue hides from various sources without fear that they cannot be used because of the previous processes used to treat them

Processing

– The general reduction of the quantity of chemical products used for retanning

– The reduction of the quantity of colorants necessary

Waste products

– Waste waters are less contaminated because of the reduction of the products used and the better capacity of products to bond to the leather fibres

Finished leather

– The hides are more consistent and uniform and will not present differences from the wet blues used

– The surface area with problems of blowing is reduced

– The leather, uniformly more elastic, will react better to mechanical operation and as a consequence an increase in surface area is possible

– The elimination of the phenomenon of colour spotting due to the presence of surface calcium salts

– A better uniformity of the structure of the leather between the compact and spongier areas

OUR PROPOSAL

In order to do this kind of wash adequately and without compromising the structure of the leather, we have developed a chemical product named **Chimotan AX.** **Chimotan AX** is a product based on strong organic acids, capable of dissolving the “little rocks” that are found within wet blue hides.

In order not to damage the structure of the leather, **Chimotan AX** has an absorbent effect, and even when excessive amounts are used it does not damage the derma fibre. Because it is totally organic, it acts with the chromium salts as a mask so that it helps to optimise the distribution of the chrome itself in the leather.

SUGGESTION

This technology is very easy to use and the improvements are quite noticeable.

We suggest performing a simple test in your own experimental laboratory in order to see for yourselves just how advantageous this process is.

– Take a whole wet blue hide in which “little rocks” are present

– Cut it into two halves and proceed to retan them as usual

– On one half perform the standard process

– On the other half perform the treatment with **Chimotan AX** and then perform the standard process

When the two halves of the leather are dry, compare them and evaluate the softness, fullness and intensity of colour to see the differences that only **Chimotan AX** can make.

Finimont present **Acrythane**

The acrylic answer to polyurethanes

Finimont’s desire to explore new frontiers has led to technological solutions that are increasingly advanced and competitive in order to meet the requirements of the tanning industry. The constant presence in Santa Croce sull’Arno’s Leather District offers many opportunities for cooperation and the optimisation of product development. One of the results of such a cooperation was the birth of a particular emulsified acrylic copolymer with which it is possible to obtain a resistance similar to that obtained through the use of polyurethanes. **Acrythane** is the answer to the problem of striking the right balance between the desire for “fashion articles” and the importance of adequately respecting parameters of solidity, keeping in mind as well the significant economic advantage of using an acrylic resin instead of a polyurethane.

To date, traditional finishing works on the underlying strata, first with soft films and then with successively harder ones, ending up with the final application of the hardest in order to obtain a good general physical solidity. It is often necessary to create articles that are more open, soft and elastic, but these may not have the desired resistance. Leathers treated with **Acrythane** behave differently, more naturally and softly, with good adhesion, giving them excellent resistance to folding and abrasion. Up until now, these qualities were obtained through the use of polyurethane resins that sometimes caused the leather to turn rigid. Through the application of **Acrythane** it is possible to obtain a good base covering in relation to the quantity used, without the drawback of stickiness that is often the result of using normal acrylics. Leather treated with **Acrythane** react very well to embossing, appear natural and clean, and react very well to cutting.

Product characteristics

The **Acrythane** line comprises two products: **Acrythane ON** and **Acrythane LT**.

Acrythane LT forms a medium-hard, very elastic, film, with a gloss but not sticky, with good covering power and adhesion. **Acrythane ON** forms a semi-gloss film with excellent naturalistic characteristics, very refined and particularly suited to finishing soft leathers such as nappa. Physical testing has demonstrated good anchorage and holding. Both products are very suitable when coverage requires many hours of immersion.

Applications

The **Acrythane** products are used when it is necessary to obtain good mechanical resistance and a good cover while keeping the leather soft and light.

Both products are suitable for articles in nappa, but they can be used as well to create articles in smooth leather or for fashion, without forgetting the economic advantage of products such as these.

Chimont&Finimont Four stars at Tanning Tech

A brief summary of the most important novelties.

Once again Chimont and Finimont will participate at Tanning Tech (Pav. 31, Stand A1), where they will present, in addition to colours and articles for Autumn-Winter 2006/2007, some of the most innovative products from their own research laboratories. Here we give a brief summary.

Chimotan AX

This is a washing product to be used before retanning on leathers that have been tanned with chrome. It dissolves the insoluble calcium salts that remain entrapped in the fibres of the leather. Untreated, these salts make the leather hard, fragile, less resistant to mechanical actions, increases the blowing of the grain and the unevenness of the colour. The use of Chimotan AX results in a savings in chemical products for retanning, lubricants and colorants, less blowing, leather that is more elastic, the elimination of dye stains, and waste water that is less contaminated.

J Line

J Line is an innovative range of chrome retanning products for leather. J Line is a new concept, a single product for retanning but it is not a compound. It improves the physical and aesthetic qualities of the leather and does not impose technical restrictions on successive finishing. It results in products that are full, soft, with a compact grain and without the defect of blowing.

Using J Line saves money and improves quality.

Acrythane

This is a particular emulsified acrylic copolymer with which it is possible to obtain a resistance similar to that obtained through the use of polyurethanes. Acrythane permits the creation of "fashion articles" adequately respecting parameters of solidity, but with a significant economic advantage because of the use of an acrylic resin rather than a polyurethane. Acrythane has a medium-hard film, is not sticky, and has good covering power. Leather treated with Acrythane also reacts very well to embossing and cutting.

DyeUp*

DyeUp is the latest innovation with the Chimont label. This is a tanning process that results in the realisation of leathers that can be dyed directly "in the garment", that is, together with the fabric, while maintaining its characteristic softness, elasticity, lightness and resistance, and above all, without shrinkage. These qualities make DyeUp remarkable, and it has already attracted the attention of many famous signatures on the world fashion stage. DyeUp's extraordinary qualities have been tested in limited production runs in the high end of fashion, and will be officially presented at the upcoming Tanning Tech.

Icec, a question of quality

ICEC is the only institute in Europe and in the world specifically for quality for the leather sector.

ICEC is a non-profit association that was founded in 1994. Promoted by the UNIC (National Tanning Association) and by the Italian tanneries, among its members are the national associations of shoemakers, leather producers, manufacturers of accessories and components and furniture manufacturers, as well as the UNI (the Italian National Standards Body), CNR (the Italian National Council for Research), ENEA, SSIP (Experimental Station of Leather Industry), AICQ and the Ministry of Production. To date there are more than one hundred and fifty tanneries that are ICEC certified (which account for 20% of the sales of the entire sector), and Italy is the only country to have a certification system for products, permitting the branding of finished products from shoes to automobile interiors. Thanks to a consolidated partnership with the Det Norske Veritas (DNV), ICEC guarantees international quality of manufacturing standards and the ability to share knowledge between various sectors. Together the two certification entities are able to cover all the certification needs of businesses and offer the highest level service based on specific proficiencies, professionalism and international know-how.

ICEC is also SINCERT accredited for the management of systems of quality, environmental and product control, and all of its auditors have decades of experience in the field.

Here is a brief list of the Certification Services offered by ICEC and DNV.

Management systems:

– Certification of Quality Management Systems (ISO 9000)
– Certification of Environmental Management Systems (ISO 14000 and EMAS)
– Certification for the automotive sector in general (QS 9000)
– Ethical certification (SA 8000)
– Management of Safety Systems (OHSAS 18001)

Product certifications:

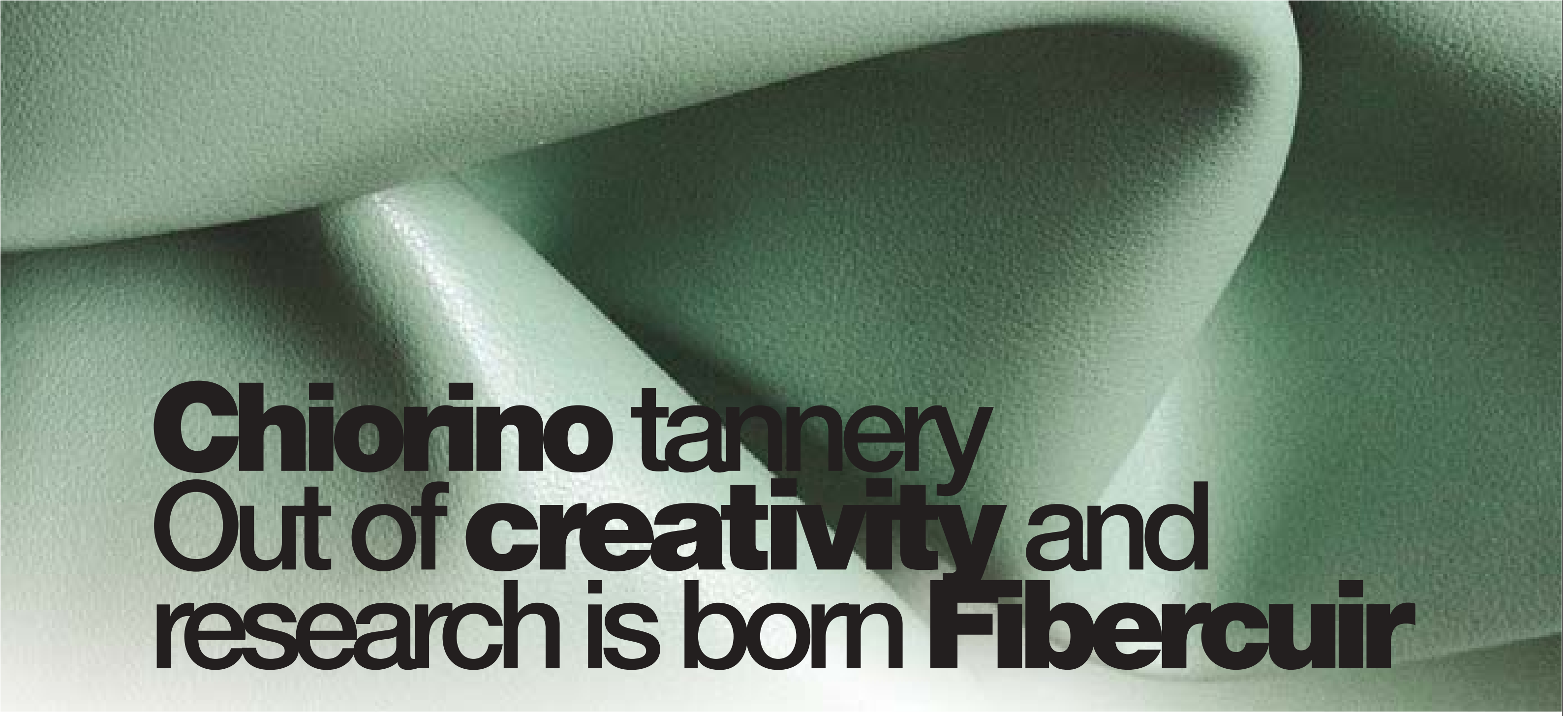
– Product certification for the leather industry, products in leather and the brand UNI
– Biodegradability (High Biodegradation Speed Degree (HSBD) method)
– PPE (Personal Protective Equipment)

For all these reasons the best companies have decided on ICEC and DNV certification.

For more information, visit www.icec.it

ICEC

DNV
DET NORSKE VERITAS



Chiorino tannery Out of **creativity** and research is born **Fibercuir**

Interview with Lorenzo Chiorino

Chiorino Tannery is a point of reference in the technological sector of leather production. For years, in addition to "normal" tannery production, it has given particular attention to internal research in order to create innovative products and processes such as that of the Fibercuir® system, a revolutionary method of leather working, patented by this Biella company.

We asked Dr. Chiorino, A.U. of the company, what the history and the values of this innovative business are founded on.

The technological tradition of our company has a hundred-year history. Chiorino was founded at the beginning of 1906 as a tannery specialising in leathers for technical use, such as transmission belts and accessories for saddlers.

The fact that it was located in an area that did not specialise in tanning but in textiles did the rest: isolated from a larger context, the exchange of knowledge was limited and we were, in a manner of speaking, forced to develop our own new technologies internally in order to grow by diversifying our products. Today the company has two internal laboratories, one dedicated to quality control and the other to applications, both focusing on the development of new articles. Our sensitivity to technology expresses itself as well in the most powerful and up-to-date anti-pollution equipment throughout the entire purification system. The new tower for the treatment and breakdown of fumes places our air treatment system on the avant-garde with respect to the present standards, in line with European Community standards. We obtained the ISO 9002 certification at the beginning of 2001, and we are now in the process of obtaining ISO 14000. Our client assistance is another fundamental point in Chiorino Tannery's philosophy. Our technical service is continually at the disposition of all of our clients. This too is another way of conducting research.

Speaking of applied research, will you tell us about Fibercuir, the exclusive patented process that the Americans like so much?

Fibercuir is the brand that identifies a process of working leather, designed in order to give natural leather exceptionally pleasing characteristics without altering its intrinsic qualities, guaranteed by the fact that the final product is labelled "real leather" and "real hide".

Specifically, the natural product is subject to a treatment which, thanks to the application of an imperceptible film, imparts to the leather certain characteristics that could not be otherwise obtained, such as water-repellence, an elevated resistance to wear and tear and to chemical agents, an elevated light fastness, and makes it exceptionally pleasing to the touch. The possibility of making a transpirant refinishing as well as one that is flame-resistant in order to make the finished product self-extinguishing, permits Chiorino to successfully develop new applications. These developments were made possible thanks to dedicated internal research, to personnel that is highly specialised, and to continuous investments in technological as well as commercial contexts.

Is "Made in Italy" still an inexhaustible resource for innovative production, or is it, to the contrary, running out?

I can most specifically talk about our experience. To date the company has primarily followed certain sectors that were tied to the world of fashion, such as leather wear and shoes. For some years, however, our interest has been moving towards contract interior design, where the technological aspect of the product is a greater determining force. We have set up a particular technology named "Fibercuir Grandprix", which does not use any halogenated products. Innovations such as these have permitted us to realise "Flame-retard" products, for which we have obtained some important certifications ((UNI 9175/87 – UNI 9175 FA – 1/94 BS 5852 1/79 – IMO RESOLUTION A.652(16)/89 – EN 1021-2/93 – EN 1021-2/93).

This has meant getting back into the game in contexts that were as yet unexplored, in search of something that would show our potential to innovate rather than to rest on the laurels of past accomplishments, by now firmly in the hands of our competitors.

We hope to continue to do our best on the road we have chosen, convinced that we, like many other Italian businesses, still have a lot to contribute and to develop in our field.

For more information, visit **www.chiorinotannery.it**

Shanghai, an international exhibition

Its the Chinese fair dedicated to the whole district. Accurate organization even in selecting visitors.

© Tecnologie Conciarie

ACLE, CIFF and Moda Shanghai occupied the halls of the new Shanghai-Pudong based international fairground – from September 7 to 9, a Chinese appointment that joins three events and allows participants to have a wider idea of the district.

ACLE exhibitors were 857 including chemical manufacturers, machine manufacturers, tanneries and accessory manufacturers, many of them were form foreign Countries with Italy playing a primary role: this year for the first time Assomac set up a collective pavilion in addition to single exhibitors, tanneries grouped under the umbrella of Unic and to the “Innovation for…” area organised by Editma.

CIFF and Moda Shanghai exhibitors where 231: 188 of them where Chinese companies, the other were Japanese or Indian. India was this edition’s “Focus Country”.

Analysing visitors data, we notice a total presence of 14,382 buyers, 11,323 of whom were from China, 589 from Hong Kong and Macao and 341 from Taiwan. As usual, the event was sided by a number of fringe initiatives: technological seminars, presentations of fashion trends and parades.

Speaking about the fair, a few aspects have characterised this edition.

Some other fairs are creating their own space in China, but Shanghai remains a very important appointment because it joins the whole district and, above all, because manufacturers of leather finished articles – shoes, bags, belts and garment – consider Shanghai as the most lively and international market where they can present their collections.

On the other hand a foreign buyer prefers the trendy atmosphere of this town rather then elsewhere, and this aspect affects also suppliers who work upstream the finished product. The confirmation comes from many international technology exhibitors who have increased in number compared to the past, in order to be in direct contact with customers: someone is even placing a question mark on the future participation in Hong Kong editions. As far as the finished product is concerned, there are less international exhibitors and more Chinese manufacturers.

Considering the professionalism of the operators visiting Shanghai, the organisation plays a fundamental role, as the organisers have operated a rigorous selection of visitors who were chosen for their qualification and specific interest: in general the exhibitors expressed satisfaction for the contacts and for visitors’ interest. Even fringe events are always centred on specific subjects. Speaking of product proposals, CIFF and Moda Shanghai are centred above all on footwear and leather garment: footwear percentage is more or less stable, while garment registers a growth, as visual impact rather than in numerical terms, with many proposals dedicated to fur and haired articles and quite accurate manufacturing. In this evolution Shanghai is probably exerting a special attraction, because it represents the strategic centre for export-oriented Chinese products, or directed to more selected local customers, and because it is sited close to a few companies dealing with these products.

Chinese products are undoubtedly growing in term of quality and style, and the demand for leathers meeting these requirements is going up: western tanners present in the Chinese market have realised it, as well as the local tanners who are beginning to be more careful of their proposals’ composition, now no longer forced in the two-three classic colours.

As far as fantasy and effects are concerned, the Chinese offer is not convincing, and Europe is normally preferred. But the Country is running, it is fast and receptive, has several advantages in terms of general and labour costs, can count on huge manpower willing to learn. Under the technical-technological point of view, China at the moment needs no investments in research and innovation, because others have already spent time and money in this direction, in order to keep the commercial leadership in the world. ACLE hall dedicated to Chinese technology and the Asian area has grown edition after edition, with proposals that some Italian manufacturers did not hesitate to say acceptable for the market of that area: machines able to carry out the work they have been designed for, sold at inconceivable price for the Western countries.

Of course, their life and reliability are completely another story, a one of very little interest for many Chinese operators.

Obviously made in Italy – technological and tanning chemical – remains a reference point, as a goal for the technical and qualitative construction activity of machines, but also as purchase ambition to get structured for the production of articles in line with international quality standards.

Geox e Stonefly save sportsystem

2004 negative for Montebelluna: without these two popular brands invoices would be down by 8.3%. And now there is the question of Diadora…

extract from © **MdP La Conceria**

In the district of Montebelluna things are adding up thanks to a small group of growing companies, above all Geox and Stonefly. Also doing well, "small" though they be, are Scarpa, Stylgrand, Sidi, Grisport, Jolly Scarpe, Dal Bello and a few others. Andrea Tomat's Lotto is stable. Disaster for craftsmen, suppliers and Diadora, a great name in sportswear.

Geox, Stonefly, Lotto and Diadora

In 2004 the balance of Sportsystem closed with an increase of 1.86% in quantity and 0.33% in terms of invoices (–1.87% net from inflation). It produced 39.4 million pairs of shoes, creating a business worth 1.378 billion Euros. Without the so-called city sector, the balance would have been negative: –8.3%. "But let's not kid ourselves", emphasised Aldo Durante, director of the Fondazione Osem, presenting the sector's annual report, "because we are not dealing with a lucky turn-around towards casual wear, but of the beneficial effect of the duo Geox-Stonefly".

Geox has by now confirmed its role as a leader in the district. After having closed 2004 with invoices amounting to 340 million Euros, it has already shown a 30% increase in the first quarter of 2005 and has pushed its net earnings to 22.1% of its total business. The margins are very high, thanks also to China, where Geox has delocalised the majority of its production, including its children's sector (for which, however, the materials are still acquired in Italy). Growth at the same rate is predicted for the second semester, on the basis of orders taken during the winter season.

In 1997 Stonefly invoiced 24 million Euros; today it has arrived at 90, and in 2007 it should arrive a 120. This company as well, directed by Adriano Sartor, has produced in China since 2003. Recently the go-ahead was given for a project to distribute its shoes in the Chinese market, by means of a joint venture that foresees the opening of 50 own-brand stores in the first two years, which will increase to 120 with the insertion of a franchising project. Exports, which actually make up 52% of invoices, are expected to reach 70% within two years.

A completely different situation is that of Diadora. The group let 75 employees go and is trying to find buyers for their Invicta brand, whose sales, 90% of which are concentrated in Italy, have fallen for three straight years. 2004 accounts closed with invoices amounting to 280 million Euros (they were 290 in 2003 and 300 in 2002) and employment continues to fall: today there are fewer than 300 hundred employees, compared with 500 ten years ago). Production has been completely dismantled: what we have is a company that limits itself to managing styles and prototypes, and then acquires everything from the Far East. At the base of the crisis are errors in management, advertising policies that were too ambitious (soccer player Totti's spokesmanship cost more than one million Euros) and the crisis of Giacomelli for national distribution. In terms of products, Diadora suffered from the strong competition of products for specific sports (soccer, tennis and athletics) and has not been able to balance that with streetwear, which represents a genuine source of margin for the big names in sportswear.

If Andrea Tomat's Lotto was able to close its balance in line with that of the previous year, thanks are due to the fashion sector: we are dealing with 255 million dollars (256 in 2003). This is the road to follow for reinforcing Lotto: the company has begun a collaboration with the famous designer Alberto Del Biondi, who will be responsible for reinterpreting some of the classic styles of the Lotto brand. The collection will be in store windows in the upcoming winter season and won't be distributed by sports stores but by actual shoe stores: Stonefly is seeing to this. Other news: entrance into cosmetics (an eight-year license has been given to Weruska and Joel, leaders in the perfume sector) and powering-up of stationary goods thanks to an agreement with Cartorama.

The Brain and Brawn Drain

Apart from the woes of individual firms, the sector as a whole is suffering. Two absolute certainties are beginning to wobble: the partnership with Romania, which is no longer sufficient; and the rule of "brain here and brawn there". As to Romania, the cost of labour in Timisoara and environs have increased and several groups have decided to turn to China. The impact was felt by local distributors of leather goods, who speak of a decrease in work of some 35-40%. As long as the Montebellunese were producing in Romania, supplies continued to pass through the usual channels, that is, Italian tanneries and their local representatives. Now that the industry is looking towards Peking, there are other solutions: either supplies can be directly acquired from those tanneries than opened local warehouses, or the Chinese shoe factories can be given free reign to do everything, making choices autonomously. The second strategy might seem to be "suicide" in qualitative terms, but can be justified in practice: if the Asian producer acquires leather on his own, it is still possible to contest eventual defects in workmanship. If the typology of the materials is set by the commissioner, the manufacturer tends to shirk responsibility for defects in the leather that he is given to work with. The impression is that Chinese supplier prefers to procure his own leathers (not rarely he is also the owner of a tannery), and is more careful about the production of shoes when he has the full control over the productive cycle.

But there is also the question of the exportation of know-how abroad, and the consequences are beginning to be felt: the transfer of design grew from 0.06% to 4.4%, and in design projects we have increased from 1.2% to 5.5%. This means that companies, closing a first era of delocalisation based on individual phases, are now looking at the entire cycle: four shoes out of ten are not delocalised, but directly acquired. Alessandro Marcolin, chief administrator of Crispi Sport, remarks bitterly, "In only ten years we have burned up a century of history. Could it have gone differently? Perhaps so: it would have been sufficient to have avoided the price war and to have known how to manage what already existed".

Niche strategy

The niche markets are holding. Crispi closed the last two years with the best results in its history. It aimed at alpine sports, light trekking, telemarking, as well as military shoes and shoes for hunting. Using only select Italian leathers of substantial thickness, it produced internally 35 thousand pairs, again as many through local suppliers and some 40 thousand in Romania. It shoes were on the feet of the Italian expedition that conquered K2 fifty years after the first ascent. There is Sidisport, the world leader for shoes for cycling. There are those who produce shoes for motorcycling, great consumers of technical leathers such as Alpinestars, Axo and all the others who shoe the centaurs of the road. And then there are specialists in shoes for mountaineering such as Lowa, who offers articles that cost the public as much as 600 Euros, designed to withstand critical temperatures and perform remarkably. They use only leathers of Italian and German origin, whose thicknesses exceed four millimetres. They are part of the Tecnica group, which brought its own invoices to 360 million (339 in 2003) after having taken over Nordica, the brand specialising in ski boots, a sector in which it is today the world leader (1.5 million pairs between Nordica, Tecnica and Dolomite). Some have been able to carve out a space in areas other than sports. One of these is Loren, which has a small production (4 million Euros in invoices) in orthopaedic shoes and comfort lines. They have obtained a patent for the insertion of a magnet in the insole, in order to apply magnet therapy through the shoe. They directly produce 50% of their shoes, the rest coming through local suppliers and (a small percentage) of marketing of Romanian products.

From left, Adriano Sartor (Stonefly), Andrea Tomat (Lotto) and Mario Moretti Polegato (Geox)

J Line, what shoes!

Personalising leather for shoes has never been so easy

It is certainly true that in recent years life styles have been conditioned by the frenetic evolution of fashion, and as a consequence, by the productive technology related to fashion. In particular, for the shoe producing sector the need for innovation is keenly felt.

In the tanning sector all of this has provoked constant research accompanied by noteworthy economic investments in order to stay up to date with the innumerable trends, and to be able to respond rapidly to market requests. This often forces tanneries to maintain a warehouse with excessive quantities of chemical products of various kinds, in order to produce leathers that can satisfy the multiple requirements of the fashion industry.

This is where **J Line** (**Chimotan JB** and **Chimotan JW**) comes in. Used in chrome retanning of leather, J Line permits the realisation of any kind of shoe whatsoever, from soft nappa to rigid and pointed leathers. Applying **J Line** for chrome retanning for leather is particularly easy, and in the great majority of cases, in order to personalise the finished article it is sufficient to adjust the quantity and the technical characteristics of the lubricants used in the retanning process. **J Line**'s characteristics (**Chimotan JB**, more rigid and firmer, and **Chimotan JW**, softer and white in color) confer on the leather the qualities of fullness, body, softness and roundness, practically all the qualities that are most frequently asked for in an excellent shoe leather. There have been many cases in which **J Line** has been used exclusively as the only retanning product.

Another very important characteristic of **J Line** is its complete ability to fix itself to the leather (as can be easily seen by the cleanness of the waste waters and the retanning washes, and easily confirmed by the analysis of the waste water itself). This explains the elevated retanning effect of chrome on leather.

J Line fully satisfies the tanner's technical, operational and economic requirements because it permits the combination of quality, simplicity and rapidity in the realisation of articles, improves the performance of the hides, and thanks to its versatility, decrease the need to stock of numerous retanning products.

General application of **J Line** in shoe making: on wet blue hides after neutralising to a PH > 5.7, use **Chimotan JB or Chimotan JW** or a combination of the two in quantities that vary from 3% to 20% according to the article to be created, then dye and lubricate.

looking At Italprogetti

Polypropylene drums

A gentle revolution in the leather process

The use of polypropylene for manufacturing liming tanning and dyeing drum is changing the machine that has been for several years the most traditional in every tannery of the world.
It is true that the use of stainless steel (and in some case also the fibreglass) has introduced some change, but it interested only the higher segment of the market and did not really change the image of the wooden drum as the only machine widely used for the chemical process of leather.
Listing the advantage of polypropylene compared to wood or stainless steel is quite a long task, but it is interesting to resume the most important ones:

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

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

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in the World

Japan / **Japanese leather industry stable in 2004.**
Following a considerable decrease in the size of the Japanese bovine leather industry since 1980 - it is a third of the size it was 24 years ago - it has been essentially stable since 2002.
A total of 3.17 million pieces of cattle hide were processed in 2004 compared with 9.78 million in 1980. Imports of cattle hide were 1.925 million pieces in 2004, mostly from North America but also from Australia and New Zealand. Bovine wet-blue imports have doubled since 2002, from 1.517 million square metres to 3.163 million square metres.
The production of pigskin leather is stable at over 16 million pieces annually.

Italy / **Made in Italy, no signs of recovery.**
Negative sign persists in the situation of Italian footwear, as highlighted by 2004 statistical business data issued during Anci annual meeting.
Falling demand on international scale and the gain over of the euro have been indicated as the main causes for the crisis, but we can't underestimate the very fast growth of Asian manufacturers, in particular of China's ones, and their commercial aggressiveness.
After approximately 10% drop registered in 2002 and 2003, the trend of 2004 production volumes was leaning to the negative sign: production estimates show a decrease of –7.4% in volume and –3.6% in value for last year. In total the sector manufactured 281 million pairs (303.4 millions in 2003) for a turnover of 7,310 million euros.
Compared to 2003, exports fell by –6.1% in quantity and –2% in value and affected all types of products: 279.3 million pairs were placed on the foreign markets, i.e. 18.3 million pairs less, for a total value of 6.196 million euros.
Leather footwear, a traditional strength of made in Italy, is also denouncing a difficult situation, as they have registered –6.3% drop in volume and –3.1% in value.
Within Europe, our sales registered a further decrease in Germany, fallen by –9.9% in quantity, and in the United Kingdom (-14.6%), the first and the fourth outlet markets for the Italian shoes respectively, and in Austria (-2.5%), in the Netherlands (-5.2%), Greece (-5.8%); Italian exports have lost 19% also in the East European countries, with a worrisome decrease in Russia equal to –7.9% in quantity, though the exported values are constantly increasing (+6.7%); in the 25 Countries of the European Union the decrease was –6.6% and –10% in the Far East.
Positive results were obtained in the USA, with +1.7% in quantity and +3% in value, and in France, with +5.2% increase of exported pairs thanks to the decrease of the average price (-4.1%).
Imports continue to register record performances, in spite of consumption stagnation persisting on the Italian market. In volume the increase was +15.8% for total 311 million pairs imported in Italy (over 42 million pairs more than in 2003), equal to 2,577 million euro, with an average price diminished by –8.4%. Imports from the Far East are rising strong (+26.3% in volume): China registered a further leap forward with +27%, Malaysia rose by +234%, Indonesia by 20%, India by 41%. Anomalous growth (71%) from Macao, evidently linked to a triangular trade from other Asian Countries. Nevertheless the import-export trade maintained active with a balance of 3,618.6 million euros (-6.9%). In quantity, we imported 31.7 million pairs more than we exported, and this event had never happened before.
The data on the Italian situation reveal a stagnating domestic consumption (+0.1% in quantity) and a drop in the number of enterprises (-2.7%) and employees (decreased to 100,934 units).
Short-medium period indicators still remain oriented to minus even in the early months of 2005: the elimination of quotas from China weights on exports, which do down by further 10.7% and on imports, which maintain the record levels as in 2004.

Germany / **Record shoe imports to Germany.**
Footwear imports to Germany breached the 400 million mark in 2004, more than doubling since the start of the 1980s. China was the main supplier (28 percent) followed by Vietnam (20 percent) and Italy (11 percent). Four other West European countries – Spain, Netherlands, Portugal and Austria – accounted for a further 12 percent while other supplies were Cambodia, Poland, Indonesia, Romania and India. Thirty years ago Germany imported just over 150 m pairs.

Colombia / **Tanneries at risk.**
The Colombian tannery sector is running into difficulties since the government is clamping down on environmental issues and the treatment of industrial waste. The result has been that some 60 tanneries operating within greater Bogotà and which dump the effluent into the Bogotà river itself are now faced with the possibility of having to shut up shop.
70% of leather produced in Colombia is exported as wet blue, which limits the capacity of the industry in terms of it becoming more profitable, which would allow them make the necessary investments.

Cina / **More business in Chinese footwear.**
In the Chinese city of Jinjiang, one of the main shoes' production center of the country, it was exported about 438 million pairs valued in US$ 1,040 millions in 2004, establishing this way a new record in terms of quantity and business volume.
In relation to the numbers of Jinjiang, the quantity of shoes exported went up 11.7%. In the last year the quality of the products made in this city noticeably improved, while the unitary prices went up in a considerable proportion. The main buyer companies came from Japan, Korea, South Africa, Russia and European Union, where there is an expectation for the market to grow even more because of the quotas that were recently eliminated.

The best ideas are those that lead to concrete results. Tanning processes can be much simpler and much more efficient. Chimont, thanks to thorough research and long years of experience, creates innovative products and processes for every phase of leather tanning and finishing, making the tanning industry ever more competitive. Chimont innovation: less time, lower costs, greater security, more results.

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