

ECONOMIC PERFORMANCE

ITALIAN
TANNING
INDUSTRY

YEAR
2021

UNIC 
CONCERIE ITALIANE



PRELIMINARY NOTES

0

In 2021, the Italian tanning industry recorded year-on-year **recovery** in almost all the main macroeconomic indicators for the sector, showing itself **in line with the trend of rebounding from the pandemic** that has characterized the entire international economy.

However, the trend with respect to 2020 is **only partially representative of the sectoral picture**, as the data for that year were exceptionally affected by the effects of Covid-19 and the resulting containment measures (including the suspension of tanning production in Italy for over a month). To get a more complete picture, it is therefore **necessary to compare the 2021 results with those for the last pre-pandemic year**, i.e., 2019, and this comparison unfortunately shows a **persistent decline** (-10% production in value and -5% in volume).

Before the conflict in Ukraine, a good degree of confidence was shining brightly around the sector being able to fully recover to pre Covid-19 levels during 2022 but international tensions and **very sharp price increases in the main raw materials** (raw hides and skins, chemicals and, above all, energy) are likely to inhibit the timing and intensity of recovery, with potentially even very serious consequences for financial sustainability.



ITALIAN
TANNING
INDUSTRY
OVERVIEW

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COMPANIES

1,154 (-0.9%)



EMPLOYEES

17,831 (+3.2%)



VOLUME

111 million square meters (+13.6%)
finished leather 8 thousand tons (+14.3%)
sole leather

PRODUCTION VALUE

4.2 billion euros (+17.5%)



EXPORT

2.9 billion euros (+18.3%)



ITALIAN TANNING INDUSTRY PRODUCTION

2

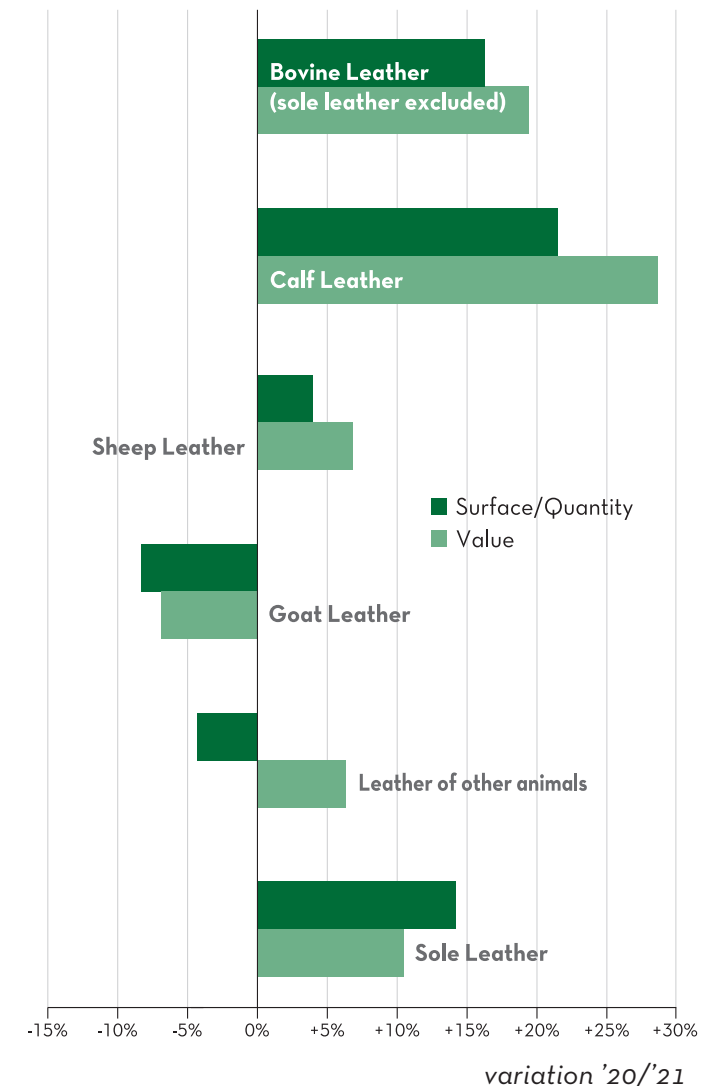
	2021		Var. % '20/'21	
	Volume	Value (million euros)	Volume	Value
Tanning production (volume in '000 sqm)	110,559	4,074	+13.6%	+17.7%
Sole Leather (volume in tons)	7,792	85	+14.3%	+10.2%
Total Production		4,159		+17.5%
Total Export		2,950		+18.3%
Apparent share export/production		71%		



PRODUCTION BY ANIMAL TYPOLOGY

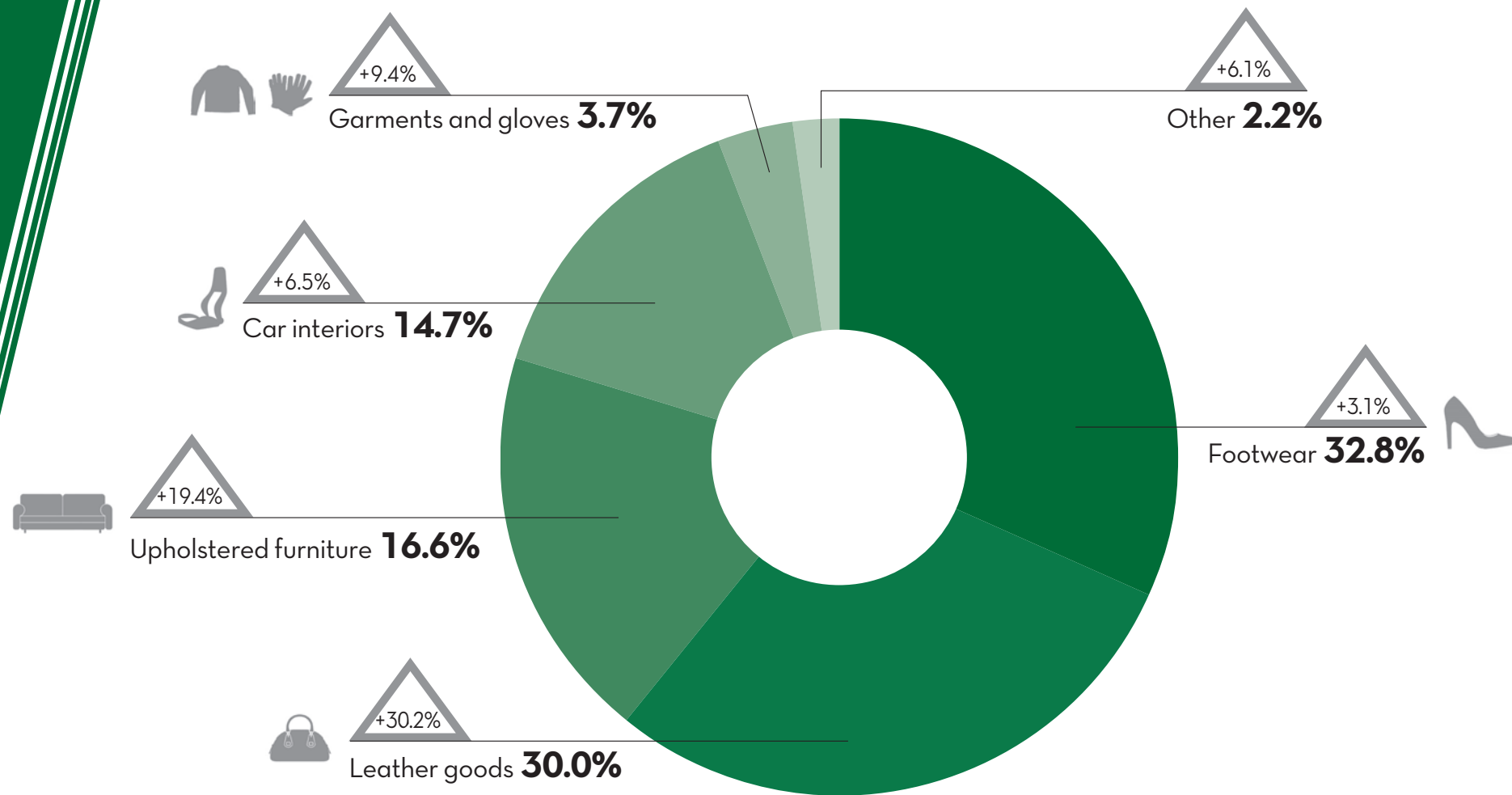
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	2021	
	Volume (000 000 sqm)	Value (million euros)
Bovine Leather	87.1	3,117.7
Calf Leather	8.1	426.4
Sheep Leather	8.8	259.7
Goat Leather	6.2	175.9
Leather of other animals	0.4	94.4
SUBTOTAL	110.6	4,074.1
Sole leather (tons)	7,792	84.8
TOTAL		4,158.9



PRODUCTION BY DESTINATION USE

4

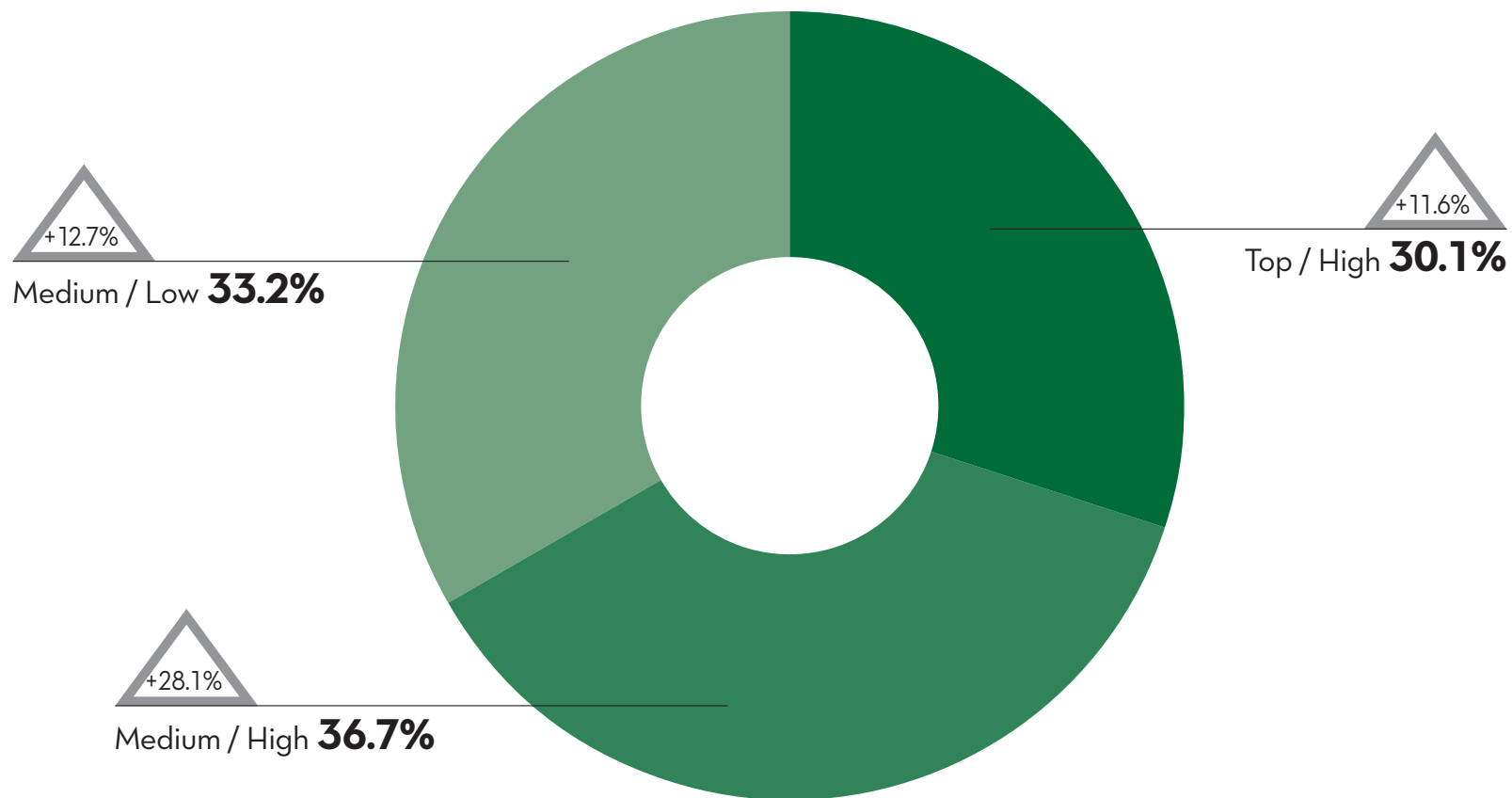


shares on total volume 2020 and variation '20/'21



PRODUCTION BY PRICE RANGE

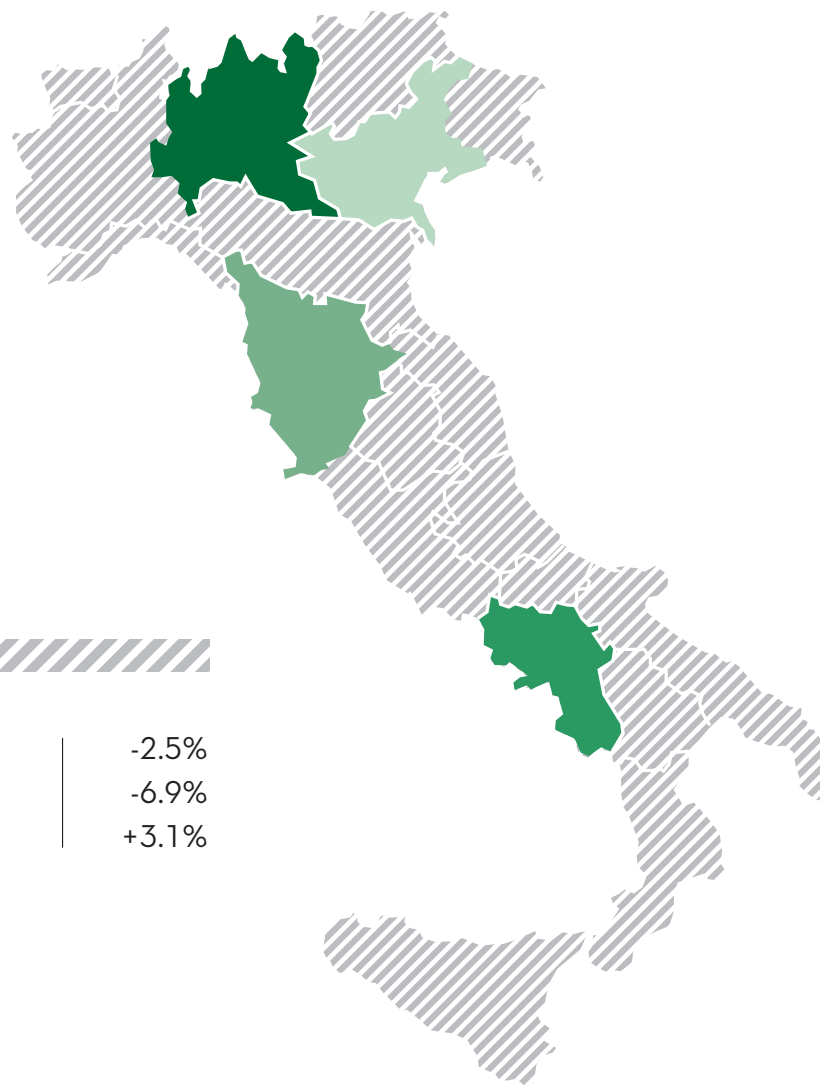
5



shares on total volume 2020 and variation '20/'21



REGIONAL DATA



OTHER REGIONS

Employees:	576	-2.5%
Companies:	27	-6.9%
Turnover:	85 mln. €	+3.1%

VENETO

Employees:	8,563	+1.2%
Companies:	446	-0.7%
Turnover:	2,546 mln. €	+16.8%

TUSCANY

Employees:	5,920	+5.6%
Companies:	506	-0.8%
Turnover:	1,160 mln. €	+24.7%

CAMPANIA

Employees:	1,864	+5.8%
Companies:	141	-0.7%
Turnover:	220 mln. €	+5.7%

LOMBARDY

Employees:	908	+6.1%
Companies:	34	-2.9%
Turnover:	148 mln. €	+7.0%

2021 data and '20/'21 variations



INTERNATIONAL LEADERSHIP OF THE ITALIAN TANNING INDUSTRY

7

IN EUROPE

66%

of production value



62%

of production volume

WORLDWIDE

23%

of production value



30%

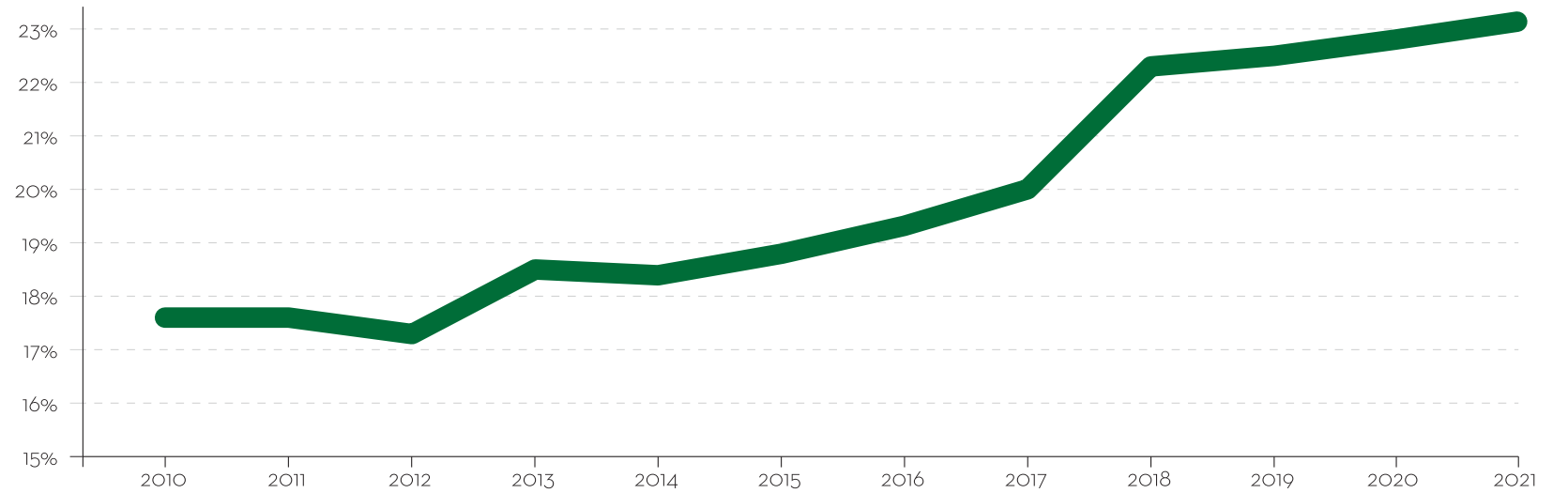
export of finished leather



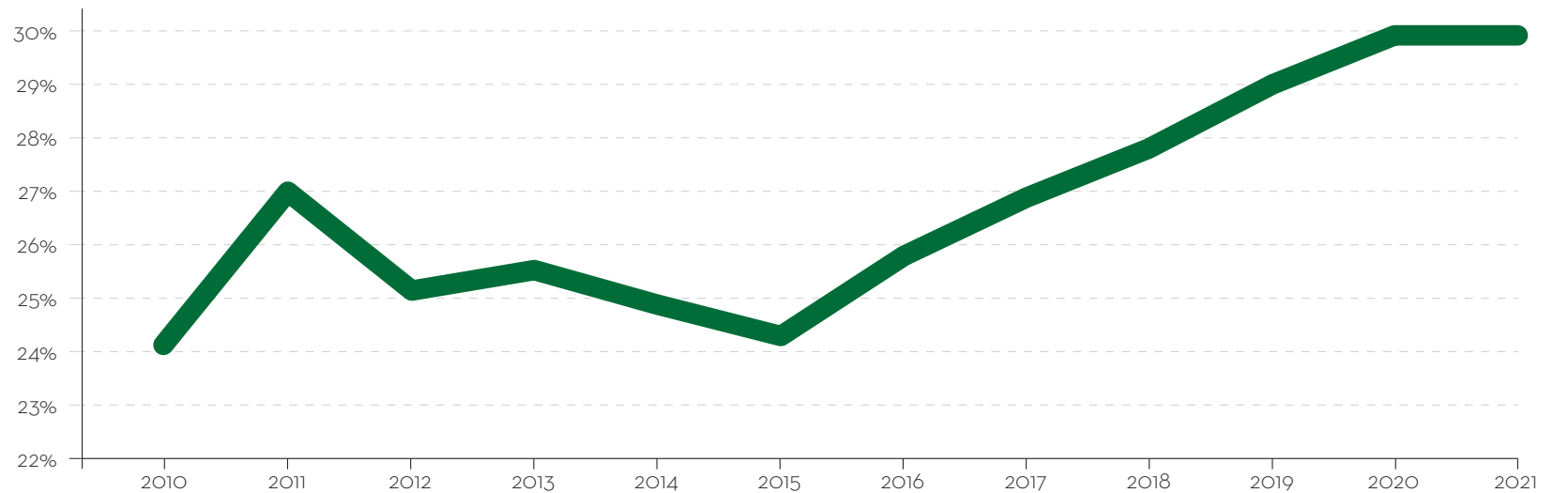
INTERNATIONAL LEADERSHIP OF THE ITALIAN TANNING INDUSTRY

8

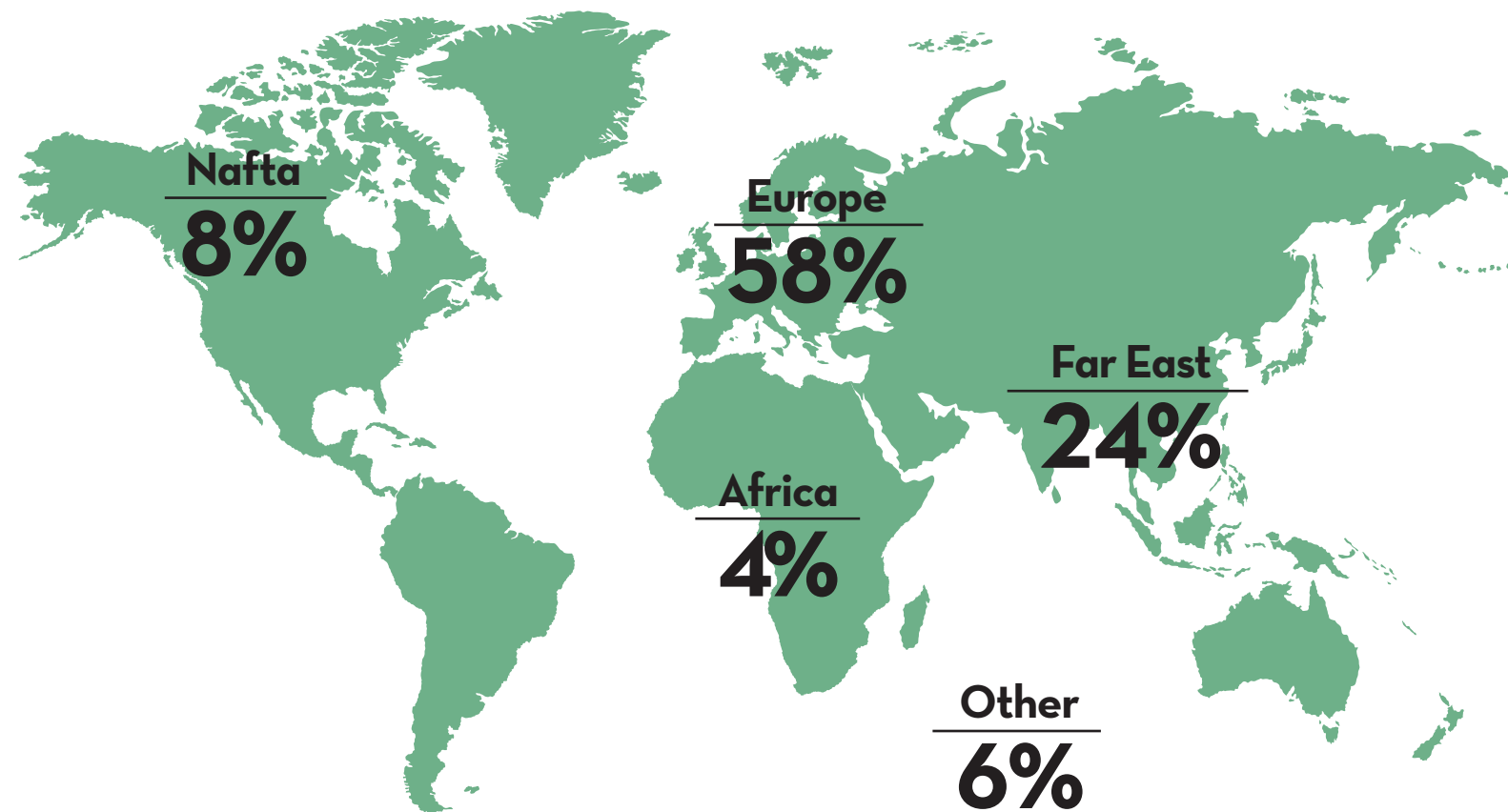
ITALY'S SHARE IN WORLD PRODUCTION VALUE



ITALY'S SHARE IN WORLD EXPORT VALUE



ITALIAN EXPORT OF LEATHER MAIN AREA OF DESTINATION



2.9 billion €  **117** Countries

shares on total value 2021



ITALIAN EXPORT OF LEATHER BY MAIN COUNTRY OF DESTINATION

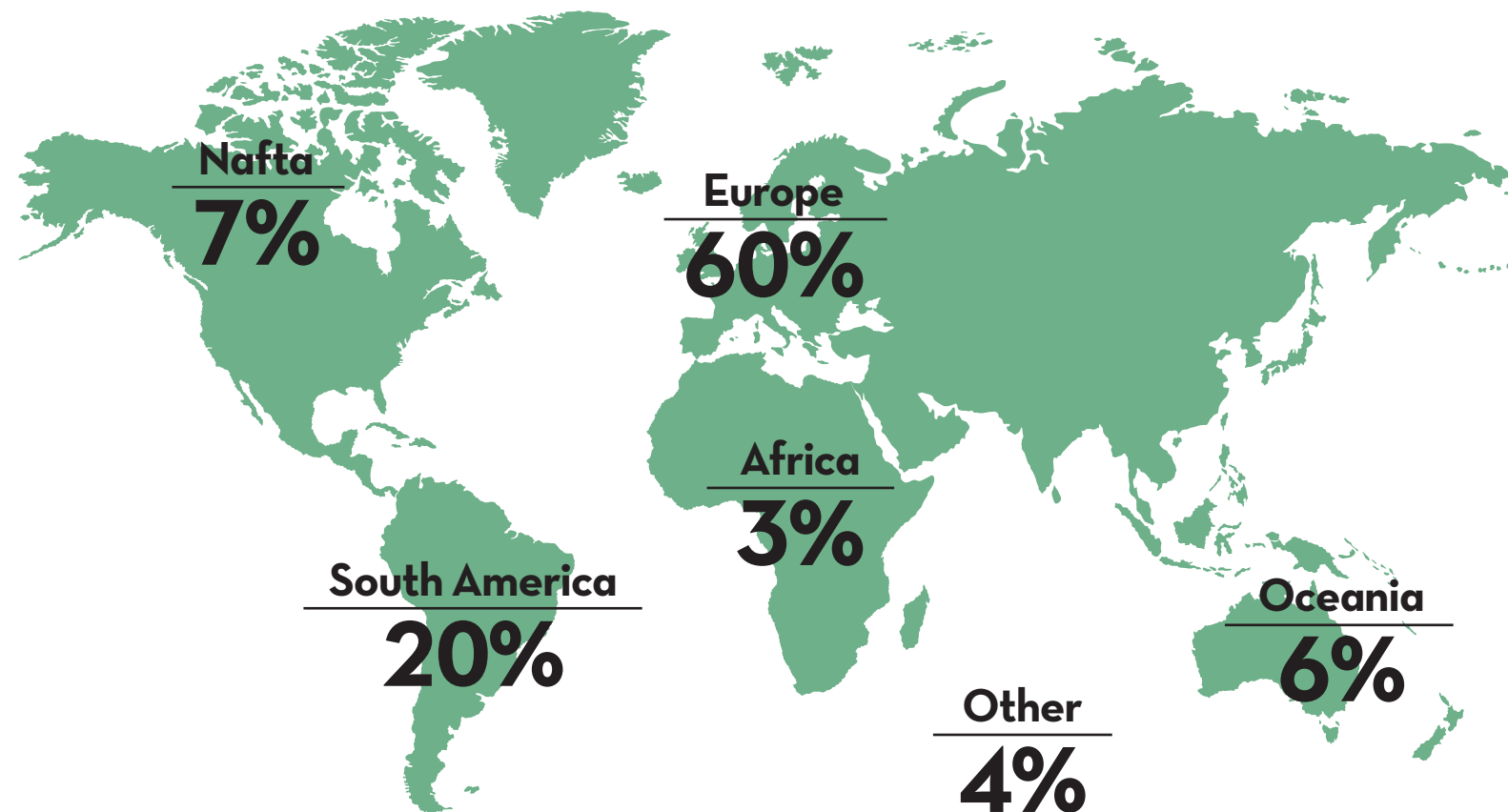
	Value 2021	Var.% 20/21	Share on total export
France	227.4	30.0%	7.7%
Romania	214.3	11.1%	7.3%
Vietnam	208.4	27.3%	7.1%
China	184.2	27.6%	6.2%
United States of America	182.2	11.6%	6.2%
Spain	172.6	37.6%	5.9%
Germany	156.7	20.7%	5.3%
Portugal	137.7	12.5%	4.7%
Poland	120.3	21.0%	4.1%
Serbia	103.4	21.2%	3.5%
Hong Kong	102.9	8.6%	3.5%
Tunisia	97.3	6.0%	3.3%
Albania	95.6	21.6%	3.2%
United Kingdom	70.3	18.3%	2.4%
South Korea	56.1	4.6%	1.9%
India	46.9	25.8%	1.6%
Czech Republic	43.4	-14.7%	1.5%
Mexico	42.7	38.1%	1.4%
Slovakia	41.2	7.4%	1.4%
Turkey	40.3	29.1%	1.4%
Other countries (97)	605.8	15.6%	20.5%
Total	2,949.7	18.3%	100.0%

value in million euros



ITALIAN IMPORT
OF RAW HIDES
& SKINS AND
SEMI-FINISHED
LEATHER
BY MAIN
AREA
OF ORIGIN

11



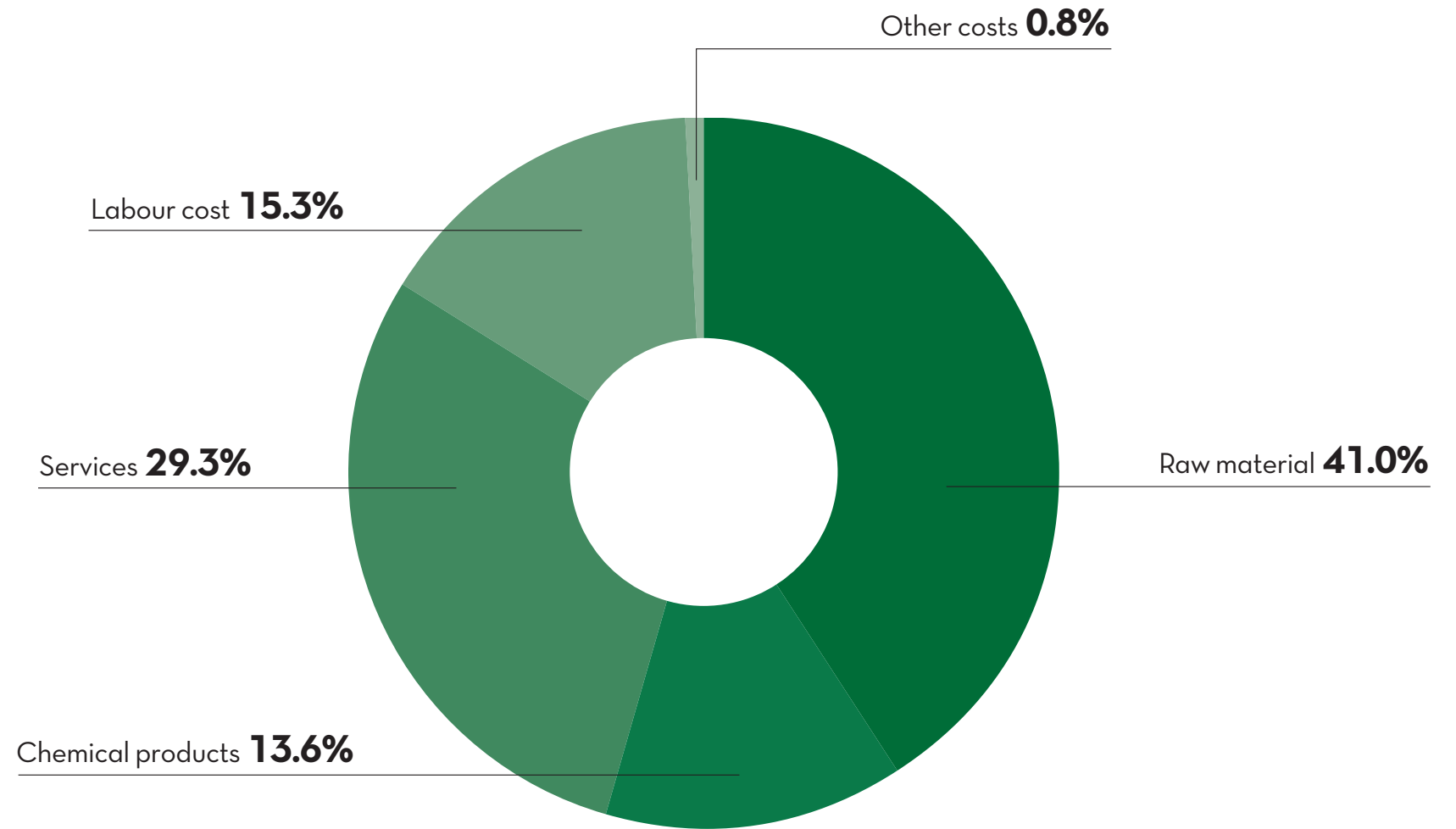
766,182 tons. ← **104** Countries

shares on total volume 2021



BUDGET COSTS OF THE ITALIAN TANNING INDUSTRY

12



shares on total costs 2021



TANNING RAW MATERIALS USED*

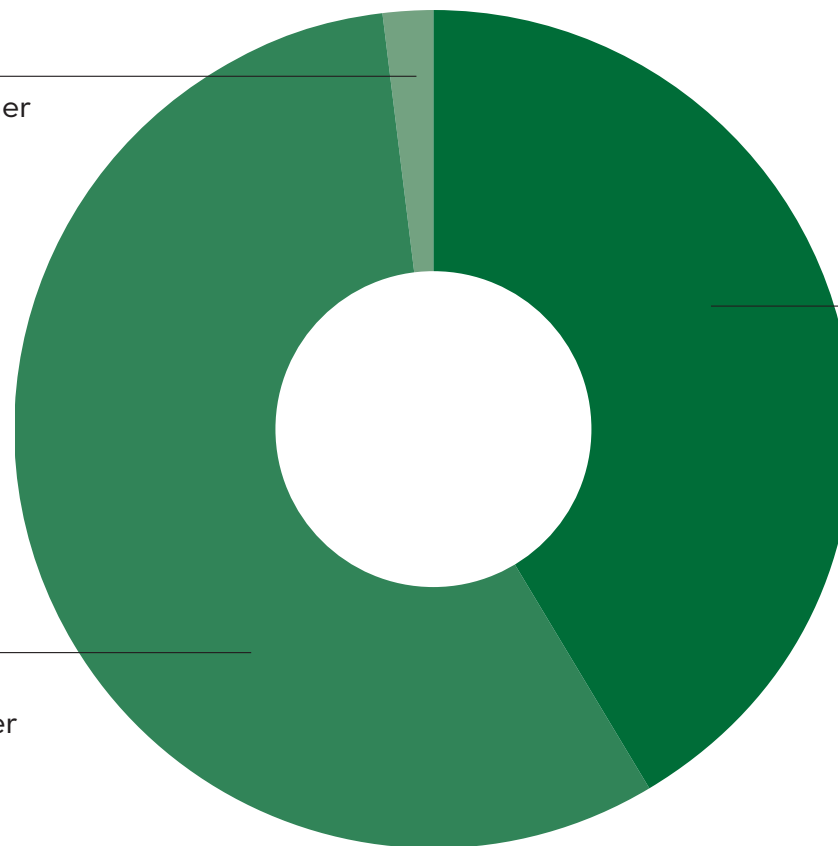
**Raw hides
equivalent volume*

13

1.7%
Crust semi processed leather

56.8%
Wet-blue
semi processed leather

41.5%
Raw hides and skins



shares on total volume 2021

