

THE ITALIAN LEATHER IS

WELLBEING
GROWTH
RESPONSIBLE
COMMITMENT
FUTURE
RESPECT
SYNERGY

THE SUSTAINABLE GOALS OF THE ITALIAN LEATHER

For 17 years UNIC has been narrating the sustainability of the Italian tanning industry with the publication of this report. Enriched in the contents, together with our sector's effort, it transmits its excellence. It was decided to further highlight our important contribution to achieve the Sustainable Development Goals of the United Nations and the results confirm how, today more than ever, the Italian tanning industry is alive, dynamic and looks forward with renewed enthusiasm.

The theme of sustainability has been in the strategies of our companies for at least 50 years, anticipating in fact not only the most stringent norms on the matter but also the, much more recent, requests of our clients. This report documents how for us sustainability is a value built in time and how we have pursued it with tenacity, with instruments and investments of which we bear the cost, obtaining extraordinary results.

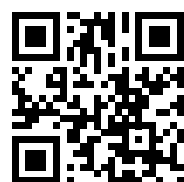
Our industry is born as one of the first recycling activities put in place by man. We are ecologists ante litteram and circular economy is part of our DNA. We are committed to minimize our environmental impact, to conserve natural resources and to guarantee animal welfare.

We are responsible towards our customers, our final consumers, our workforce that we value and train, committed to make our job also attractive to the eyes of young people.

For years we have been making important investments to give part of the value we create back to the community and participating in projects that help preserve and value our cultural heritage, of which leather is proudly part of.

We are tradition, but above all future.

Cav. Gianni Russo



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of the Sustainability Report 2019

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ITALIAN TANNING INDUSTRY AND THE SUSTAINABLE DEVELOPMENT GOALS

SUSTAINABILITY IS AN INCREASINGLY RELEVANT ELEMENT OF DEVELOPMENT FOR THE ITALIAN TANNING INDUSTRY, THAT HAS BEEN ABLE TO CREATE A SKILLFUL COMBINATION BETWEEN COMPETITIVENESS AND ECONOMIC AND SOCIAL PROGRESS OVER TIME, OPERATING RESPONSIBLY FOR THE ENVIRONMENT.

A constant commitment that the Italian tanning industry has now decided to put in relation with the 2030 Agenda for sustainable development, launched by the United Nations in September of 2015 to promote human wellbeing and protect the environment. The Agenda is an ambitious program, that defines 17 objectives (SDGs, the acronym of Sustainable Development Goals), tightly integrated and correlated with each other, which refer to different areas of the social, economic and environmental development of the planet. These are cross-cutting and complex objectives that include issues like climate change, sustainable consumption and respect for human rights.



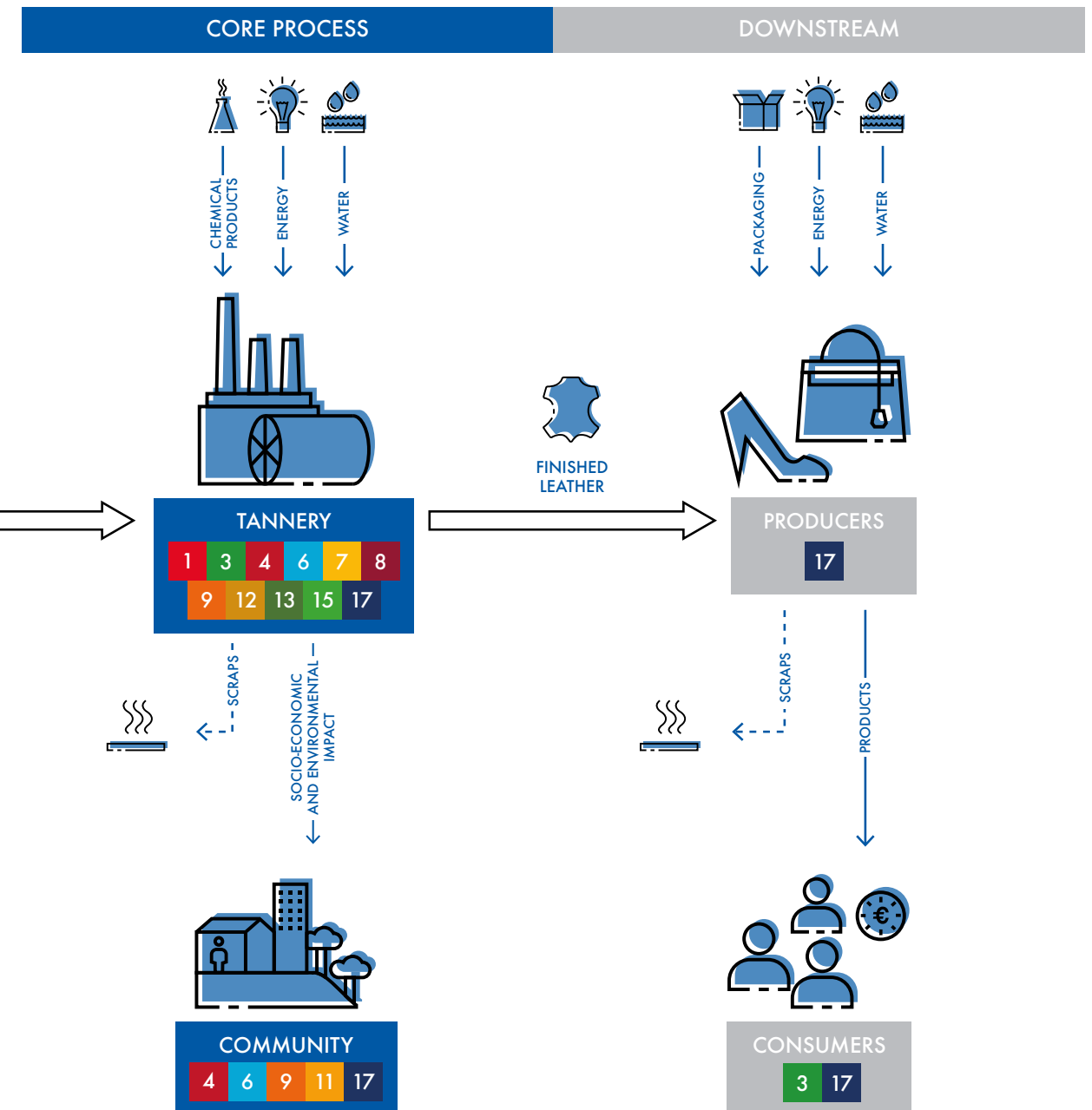
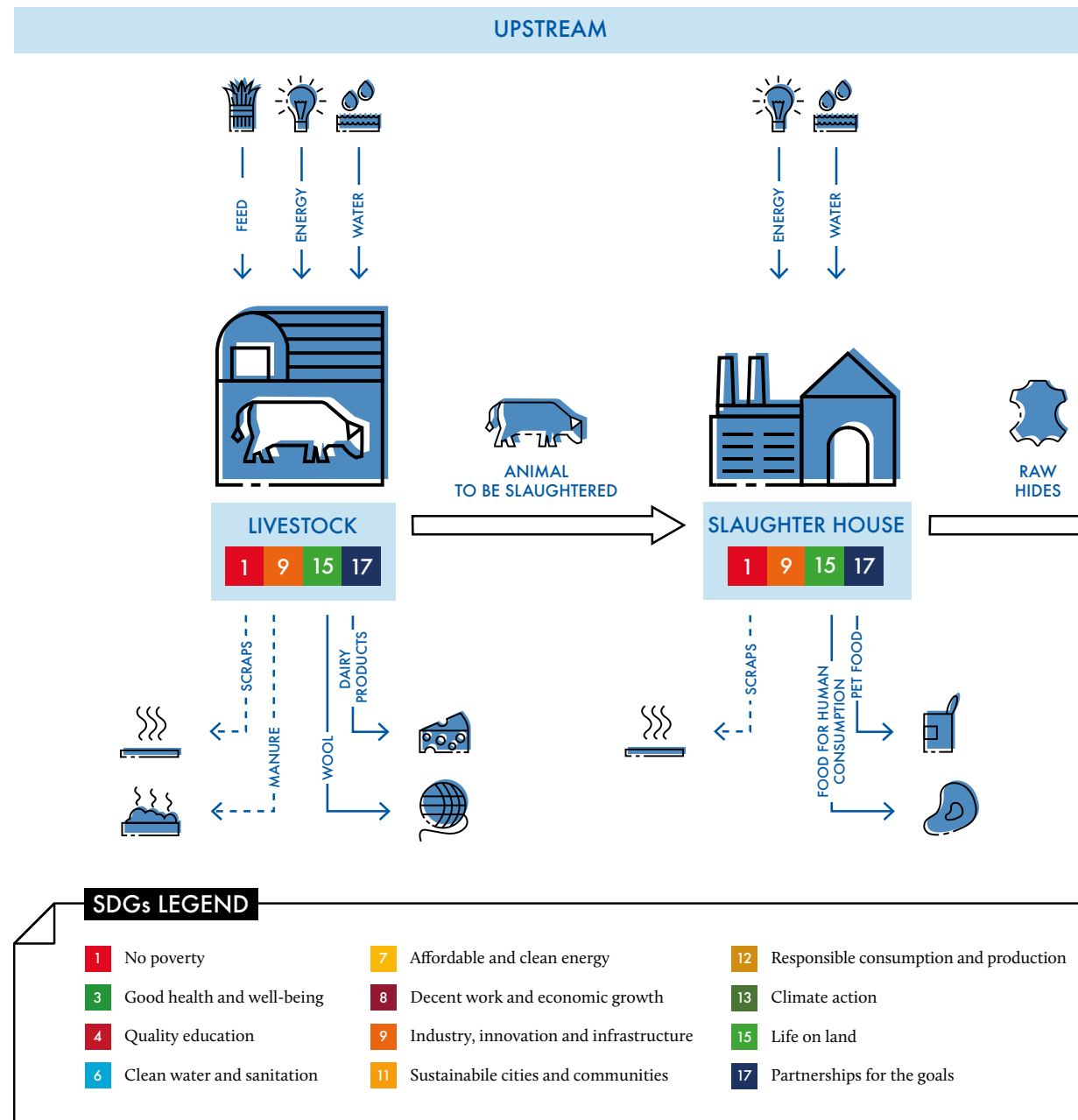
All the components of society are called to contribute in an effective manner, through new models of responsible business, investments, innovation, technological development and the activation of multi-stakeholder collaborations.

The 2030 Agenda and the pursuit of the SDGs, declined in 169 targets, require a strong commitment, but can also represent an opportunity for development and growth, contributing to change, also in the consumption models.

THE LIFE CYCLE OF LEATHER AND THE SDGs

The activities of the tannery and its value chain have a direct or indirect impact on a good part of the 17 SDGs. Some of these are considered a priority, as the contribution of the Italian tanning industry is particularly relevant. Others, up to now, are instead considered negligible. Nevertheless, initiatives, actions or good practices have already been launched,

also in collaboration with different organizations operating on a local and International level, with a long-term prospect of sharing the value. For every SDG considered relevant, studies of Life Cycle Analysis (LCA) combined with the role of the tannery in the value chain have highlighted the impacts, regardless their entity.



CHAPTER 1

THE ITALIAN LEATHER IS
WELLBEING



ENSURE HEALTHY LIVES AND PROMOTE WELLBEING FOR ALL AT ALL AGES

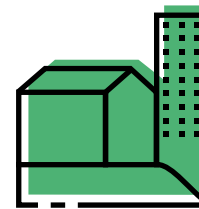


END POVERTY IN ALL ITS FORMS EVERYWHERE



THE PRODUCT

Leather has always accompanied man. The Italian tanning industry has over time been able to make it a material that interprets the idea of wellbeing at different levels: functional, emotional, aesthetic and that, at the same time, is a guarantee of security for consumers.



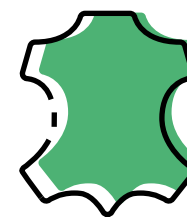
THE WORKPLACE

The Italian tanneries are companies that combine industrial with artisanal dimension. The use of modern industrial plants and the daily attention ensure the respect of high standards of health and safety of its workers.



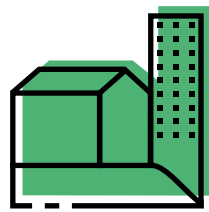
QUALITY STANDARDS AND CERTIFICATIONS

Italian leather is the raw material par excellence of high value-added articles of which the production processes are conducted and monitored through certified management tools that improve their quality, effectiveness and efficiency.



THE TRADE RELATIONSHIPS WITH DEVELOPING COUNTRIES (SDG 1)

The internationalization of the Italian tanneries is high both in terms of exports and imports. In particular, commercial relations with suppliers in developing nations, mostly for specific typologies of raw material, are of prime importance.



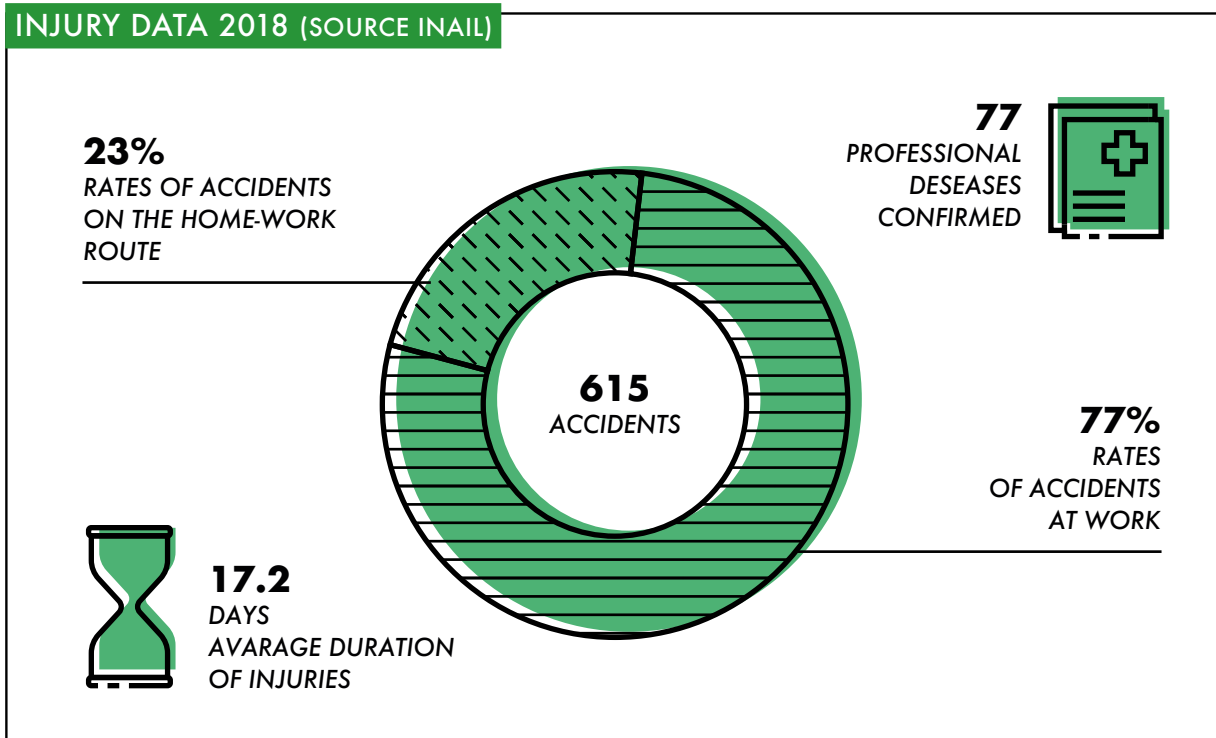
THE WORKPLACE

TO ACHIEVE A SUSTAINABLE DEVELOPMENT IT IS ESSENTIAL TO ENSURE A HEALTHY LIFE AND PROMOTE THE WELLBEING OF ALL.

For Italian tanneries this means the use of appropriate safety systems, a continuous monitoring of the workplace and the promotion of the prevention culture.

The related results are evident, as the number of accidents over the years has been relevantly reduced (-42% since 2003).

INJURY DATA 2018 (SOURCE INAIL)



THE CERTIFICATIONS



SYSTEM CERTIFICATIONS

System certifications guarantee the organization's ability to manage its resources and production processes, to meet and maintain the expected performance over time, through continuous improvement. This is an indirect form of assurance which, as far as tanneries are concerned, pertains to the management systems, either for quality (regulated by ISO 9001), or environment (ISO 14001, EMAS), or health and safety at work (ISO 45000) or ethics (UNIC Code of Conduct and Social Responsibility).



ICEC PRODUCT CERTIFICATIONS

Product certifications are regulated by industry-specific standards or equivalent technical specifications (TS). These certifications are a direct form of guarantee for customers and consumers. Indeed, they produce evidence that leather complies with technical documents, which define both the performances and the characteristics of the certified products. The industry standards set the minimum performances required for different intended uses of leather (e.g. UNI 10594, UNI 10826), the "Made In" of leather (EN 16484) and the traceability of raw materials (ICEC TS 410/412).



ICEC CERTIFICATION OF SUSTAINABILITY

The ICEC certification of Sustainability officially recognizes the full commitment of those tanneries which have a related policy and at least one certification in each of the following fields, namely: environment, ethic-social, economic and product.

CHAPTER 2

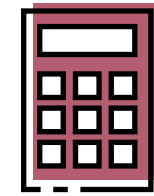
THE ITALIAN LEATHER IS GROWTH



PROMOTE INCLUSIVE AND SUSTAINABLE ECONOMIC GROWTH, EMPLOYMENT AND DECENT WORK FOR ALL



ENSURE INCLUSIVE AND EQUITABLE QUALITY EDUCATION AND PROMOTE LIFELONG LEARNING OPPORTUNITIES FOR ALL



ECONOMIC DATA

The Italian tanning industry counts about 1,200 companies, mainly small and medium sized enterprises concentrated in productive districts and generates a total revenue of almost 5 billion euros.



THE INTERNATIONAL ROLE AND THE TRADE FAIR SYSTEM

The International leadership of the Italian tanning industry is strong both at a European level, where it counts for 65%, and at a global level, representing 22% of world production value.



SOCIAL INITIATIVES IN FAVOUR OF THE COMMUNITY

The relationship the tanneries have with the local communities are beneficial both for the businesses and the society, also thanks to the multiple initiatives financed by individual companies and employer's associations.



HUMAN RESOURCES AND THEIR VALORIZATION

In a productive entity with a strong artisanal and creative identity like the tannery, people are of great importance for the company's growth due to their competence and capability.



TRAINING AND INITIATIVES FOR YOUNG PEOPLE (SDG 4)

To guarantee the competitiveness of the sector over time, it is fundamental to invest on young people, on their training, motivation and employability.

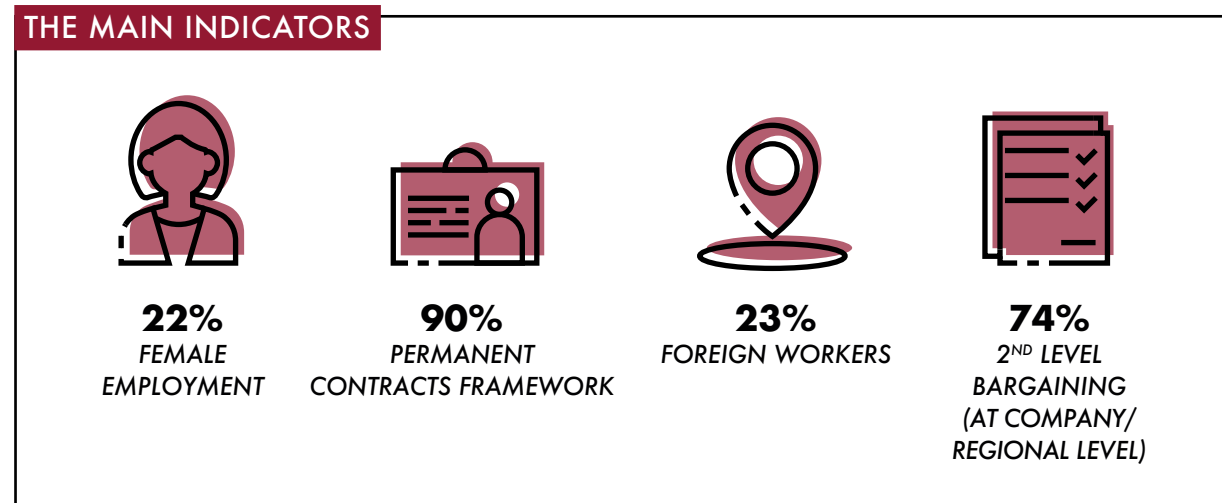


HUMAN RESOURCES AND THEIR VALORIZATION

IN A MANUFACTURING REALITY WITH A STRONG ARTISANAL AND CREATIVE NATURE, PEOPLE ARE OF GREAT IMPORTANCE FOR THE GROWTH OF COMPANIES.

Attract and motivate employees, guarantee them a stimulating working environment and promote a lasting, inclusive and sustainable economic growth are the objectives that tanning companies pursue. To protect the knowledge acquired and enhanced by workers, the Italian tanneries favor stable working relationships and adopt staff retention policies, which allow to invest in the long run on the human capital of employees.

Over 90% of the employees have a stable employment contract. The use of flexible contract typologies is limited and decreasing as compared to the previous years.



TRAINING AND INITIATIVES FOR YOUNG PEOPLE

TRAINING PLAYS A KEY ROLE IN PROMOTING A MOTIVATING WORKPLACE.

Training courses aim to improve skills and knowledge of employees working in the tannery and in the supply chain. Particular attention is paid to the various end use sectors with specific and tailor-made educational proposals.

Relationship and dialogue between school and business are facilitated, to support young employment. Furthermore, in order to ensure the availability of resources, proper trainings and highly qualified specialization courses are provided.

SKILLS 4 SMART TCLF INDUSTRIES 2030 - BLUEPRINT

The Blueprint is an European project aimed at updating and integrating the training provided for the leather sector and its value chain as well as to improve its image to young people.

FASHION STUDIO

The Fashion Studio is the main training place, where students and stylists can find and study different materials and fashion trends.

CHAPTER 3

THE ITALIAN LEATHER IS

RESPONSIBLE

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

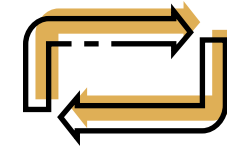


ENSURE SUSTAINABLE CONSUMPTION AND PRODUCTION PATTERNS

6 CLEAN WATER AND SANITATION

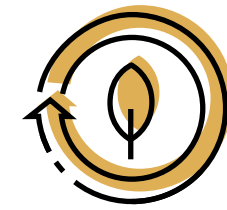


ENSURE ACCESS TO WATER AND SANITATION FOR ALL



THE CIRCULAR MODEL

The tanning industry can consider itself a precursor of circular economy: it utilizes a scrap as raw material and values its own residues through cutting-edge technology.



LCA AND PEFCR

LCA is currently the most complete methodology to assess the potential impact of a product along all its life cycle, according to rules of calculation (PEFCR) that, for leather, were established at European level.



THE ENVIRONMENTAL IMPACTS

As in all manufacturing activities, processes carried out in the tanneries generate an impact on the environment, the extent of which is minimized through specific treatments.



THE USE OF RESOURCES

The transformation from raw skin to finished leather happens utilizing resources (energy, water, chemicals) in part natural and in part transformed.



THE CYCLE OF WATER (SDG 6)

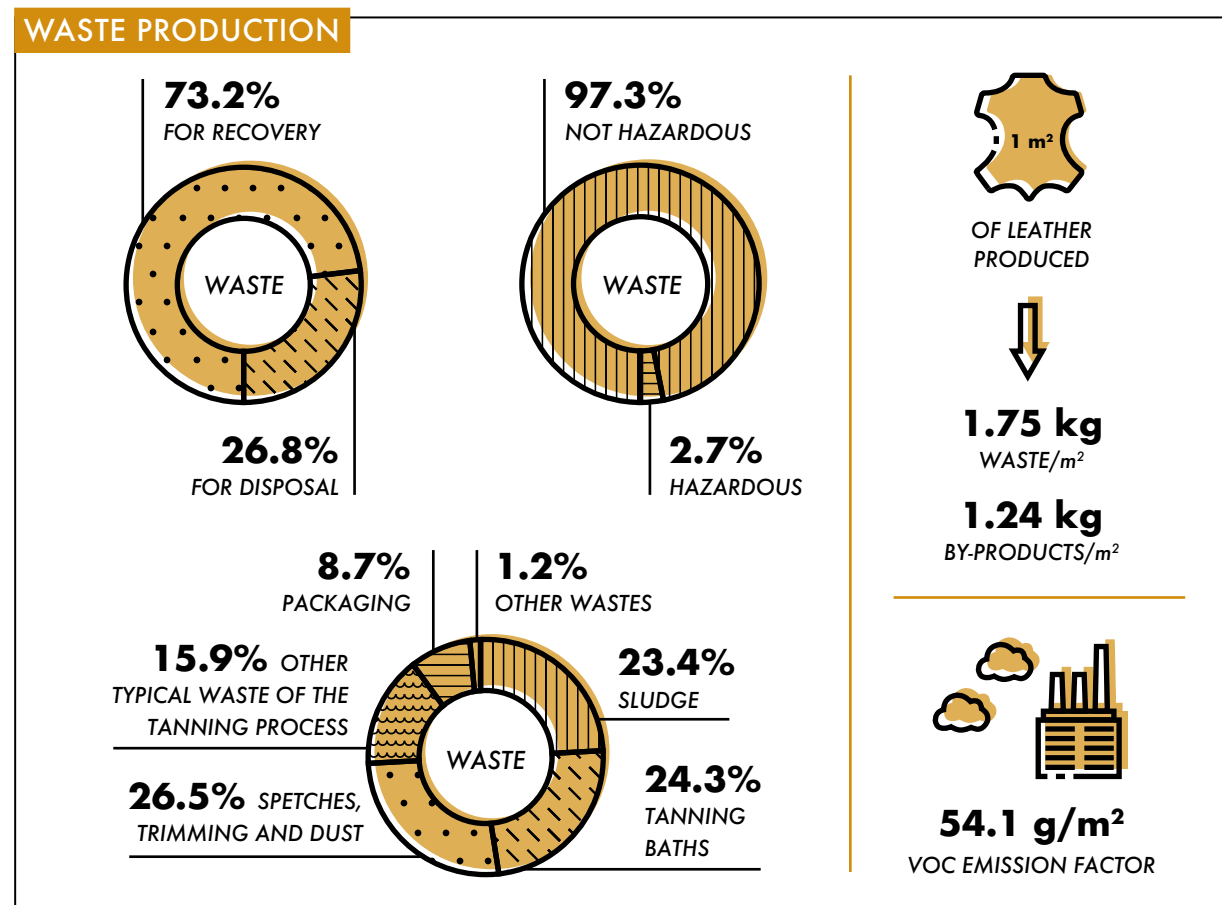
Water plays an important role in the tanning processes, being 'the means' in which most of the manufacturing processes take place.



THE ENVIRONMENTAL IMPACTS

THE ITALIAN TANNERIES MINIMIZE THEIR IMPACT WITH PROPER TREATMENT SYSTEMS.

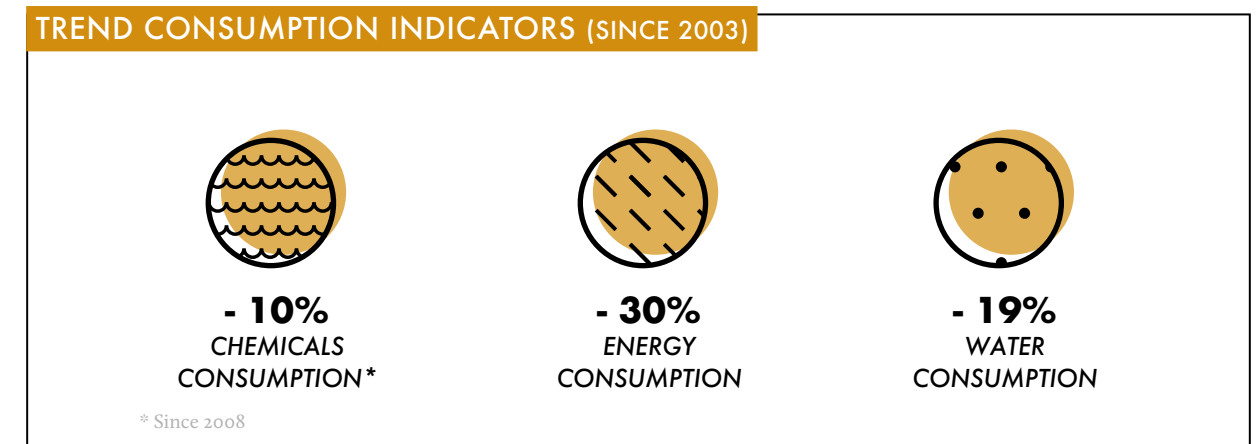
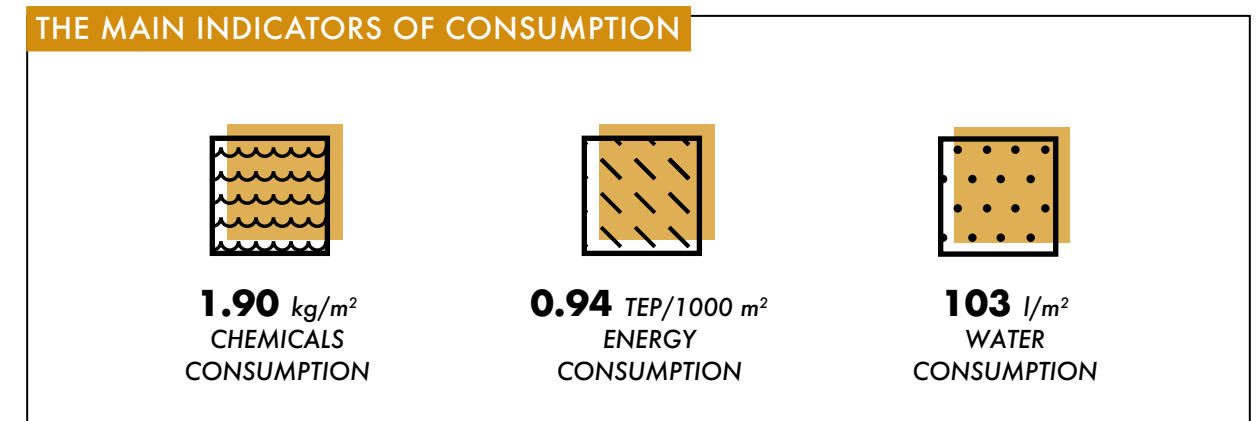
From the leather's transformation process, with the consumption of non-renewable resources, some environmental impacts arise, such as the production of scraps and waste, wastewater, emissions into the atmosphere of volatile substances and particulate.



THE USE OF RESOURCES

THE TANNING PROCESS TRANSFORMS RAW HIDES AND SKINS IN FINISHED LEATHER USING CHEMICAL SUBSTANCES, WATER AND ENERGY.

Over the years, Italian companies have been placing more and more attention to reducing their consumptions, regarding their manufacturing process and related services.



CHAPTER 4

THE ITALIAN LEATHER IS

COMMITMENT



TAKE URGENT ACTION TO COMBAT CLIMATE CHANGE AND ITS IMPACTS



ENSURE ACCESS TO AFFORDABLE, RELIABLE, SUSTAINABLE AND MODERN ENERGY FOR ALL



ACTIONS AGAINST CLIMATE CHANGE

Together with the efficient use of resources, including energetic, Italian tanneries have equipped themselves with certified management systems under which the impacts connected with their own activity including emissions are monitored. Some tanneries, starting with the quantification of direct and indirect impacts, have put in place or are considering compensatory measures.



ENERGY EFFICIENCY

The tanning sector is not energy-consuming but uses energy in manufacturing processes. Different measures have been adopted to optimize consumption and reduce inefficiencies. Many companies have invested in self-production of electricity for their own needs, recovering generated heat.



USE OF RENEWABLE ENERGIES (SDG 7)

Self-production of electric energy from renewable resources is a good sectoral practice that however finds some technical limitations, in terms of long-term performance for the return of investments, in some geographical areas. An alternative is to turn to operators on the energy market that guarantee high shares of renewable supplies.



ACTIONS AGAINST CLIMATE CHANGE

THE ITALIAN TANNING INDUSTRY HAS INTRODUCED CLIMATE CHANGE IN ITS ENVIRONMENTAL AGENDA.

In the past years a lot of companies have invested in technical and managerial solutions to contribute to the reduction of emissions, certifying their efforts.

The impact indicator used to quantify the total gases emitted from a tannery is therefore, the content of equivalent CO₂, calculated on the basis of energy consumption for the reference year.

In 2018 it was equal to:



2.0 kg CO₂ EQ/m²



USE OF RENEWABLE ENERGIES

THE ITALIAN TANNERIES BENEFIT FROM AN ENERGY MIX AMONG THE MOST VIRTUOUS IN EUROPE.

The energy needs of the tanning sector still depend, in large part, on fossil fuels. In Italy, in 2018, the percentage of renewables of electric component is equal to 18.1% (official data of Italian Ministry of Economic Development), higher than the target assigned to Italy from the Guideline 2009/28/CE for 2020 (17.0%).



ENERGY EFFICIENCY

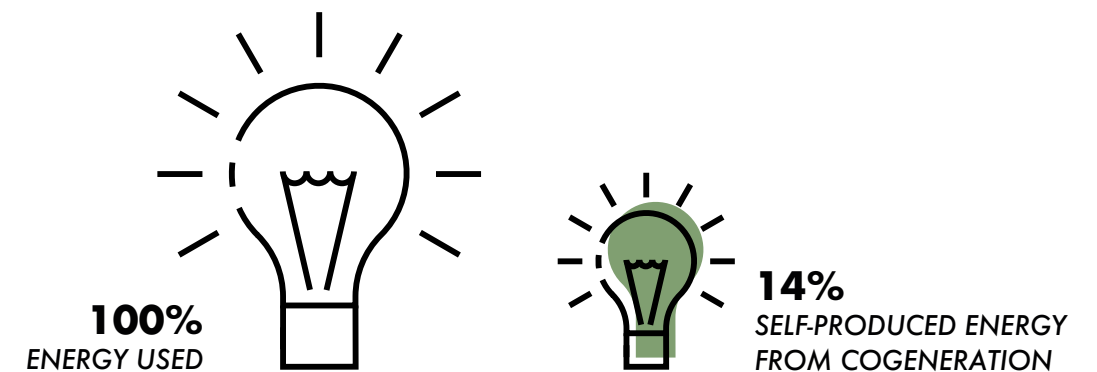
EFFICIENT MANAGEMENT OF ENERGY CONSUMPTIONS LEADS TO CONSIDERABLE BENEFITS FOR BOTH THE BUSINESS AND THE ENVIRONMENT.

Energy consumptions are an important element of the environmental costs supported by a tannery.

For this reason, the companies in the sector have implemented energy saving actions, also through the adoption of cutting-edge technologies for the recovery and reuse of thermal energy generated by processes.

Cogeneration is a technology that has found wide application in the tanning sector. Its role in the achievement of the proposals of the Kyoto Protocol has also been attested by the European Parliament.

ENERGY PRODUCED BY COGENERATION

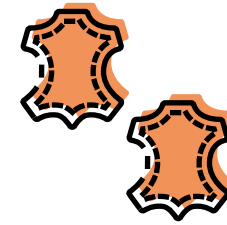


CHAPTER 5

THE ITALIAN LEATHER IS
FUTURE

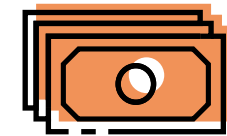


BUILD RESILIENT INFRASTRUCTURE, PROMOTE INCLUSIVE AND SUSTAINABLE INDUSTRIALIZATION AND FOSTER INNOVATION



THE INDUSTRIAL SYMBIOSIS OF THE TANNING DISTRICTS

The tanning districts are advanced models of industrial symbiosis in which a strongly interconnected system between companies for the exchange of materials (both products and scraps) and services has been developed. They are particularly relevant from an environmental point of view.



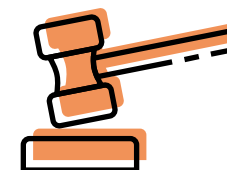
ECONOMIC COMMITMENT FOR SUSTAINABILITY

Italian tanneries dedicate important economic resources to the reduction of the environmental impact related to their own processes and products. A daily commitment that guarantees clients and consumers sustainable articles and products following principles of responsibility.



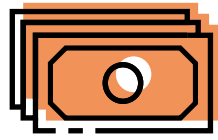
TECHNOLOGICAL INNOVATION AND RESEARCH

Research and innovation are fundamental factors to maintain and promote the leadership of the Italian tanning industry and the entire supply chain, also thanks to the technical and scientific support of Universities and research centers, in addition to investments in new and more efficient technologies.



STANDARDIZATION

The activity of standardization supports the tanneries and the entire leather supply chain to identify reference standards shared by all the stakeholders, keeping economic social and environmental aspects into account. Namely, it is a guarantee of sustainability.



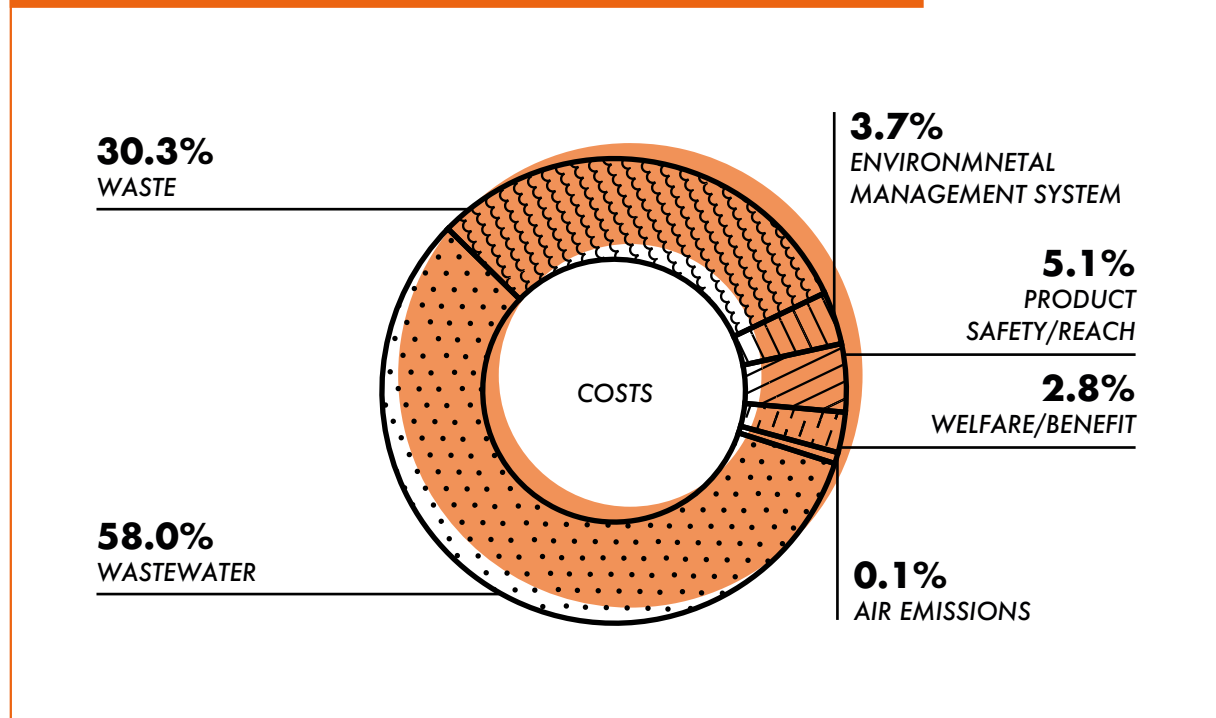
ECONOMIC COMMITMENT FOR SUSTAINABILITY

THE COMMITMENT TO CREATE A SUSTAINABLE INDUSTRY GOES THROUGH A SERIES OF IMPORTANT INVESTMENTS.

They are mainly economic investments, but also contributions in terms of research, new technologies and innovative methods of production.

The value of this commitment is on average equal to 4% of the annual revenue.

PERCENTAGE BREAKDOWN OF SUSTAINABILITY COSTS 2018



TECHNOLOGICAL INNOVATION AND RESEARCH

THE ITALIAN TANNING INDUSTRY GROWS WHILE INNOVATING.

It has particularly done so in recent years with the aid of the Industry 4.0 program that has facilitated investments in innovative and digital technologies for process management in many companies in the sector.

The areas of innovation in which the tanning companies are active and continue to invest in research and development are numerous.



SSIP - The Italian Leather Research Institute

The Italian Leather Research Institute (SSIP) operates in support of all the companies in the tanning sector and leather supply chain with activities of research and development, training, certification of products and processes, analyses and consultancy.



PO.TE.CO

PO.TE.CO is a public-private institution that provides services and consultancy for the leather supply chain in the areas of research, training, innovation and technological transfer.

CHAPTER 6

THE ITALIAN LEATHER IS
RESPECT



PROTECT, RESTORE AND PROMOTE SUSTAINABLE USE OF TERRESTRIAL ECOSYSTEMS

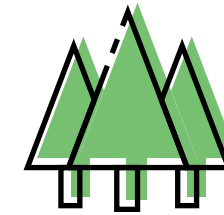


MAKE CITIES AND HUMAN SETTLEMENTS INCLUSIVE, SAFE, RESILIENT AND SUSTAINABLE



ANIMAL WELFARE AND TRACEABILITY

Traceability and control of the supplies of raw material are a fundamental goal of the Italian tanning industry, for which the sustainable use of natural resources is one of the most important values.



PROJECTS AGAINST DEFORESTATION

Biodiversity and forests are at the basis of food safety, human health and social and economic development. Their sustainable management is a focus of the development strategies of the tanning industry.



FERTILIZERS AND BIO STIMULANTS FROM TANNING SCRAPS AGAINST SOIL DEPLETION

Soil degradation and impoverishment make their use difficult for agricultural use. Bio stimulants and fertilizers produced from the recovery of tanning process waste assist the resetting of their agricultural function, facilitating plant growth.



INITIATIVES FOR THE SAFEGUARD OF ENVIRONMENTAL HERITAGE

The supply of some exotic articles contributes to the protection of the cultural and natural heritage of the places in which that same occurs, typically developing countries, not only through economic support, but raising awareness for the safeguard of habitat and traditions at risk.



INITIATIVES FOR THE SAFEGUARD OF CULTURAL HERITAGE (SDG 11)

Patronage is now part of the activity that the sector performs in favor of the community, aware that economic development is also based on the conservation of one's own cultural heritage.



ANIMAL WELFARE AND TRACEABILITY

THE TANNING SECTOR PROCESSES A RAW MATERIAL OF ANIMAL ORIGIN.

Responsible consumption of resources and safeguarding biodiversity are therefore a top priority for Italian companies.

Monitoring of supplies is of strategic importance to ensure compliance with the fundamental principles of animal welfare for their entire life.



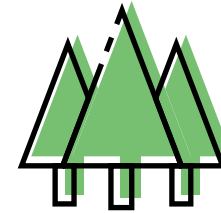
THE TRACEABILITY PROJECT UNECE - ITC

"Traceability of Sustainable Value Chains – Enhancing transparency in the garment and footwear sector for informed and responsible choices" is a multi-stakeholder initiative involving numerous governmental, associations, academic and sectoral partners led by UNECE (United Nations Economic Commission for Europe) and ITC (International Trade Center).



COLLABORATION OF UNIC WITH THE UNIVERSITY OF MILAN

The collaboration with the Department of Veterinary Medicine at University of Milan (Università degli Studi di Milano) is aimed at mapping animal welfare conditions (legislation and enforcement) in the main supply markets.



PROJECTS AGAINST DEFORESTATION

UNIC SUPPORTS THE TANNING SECTOR IN ITS COMMITMENT AGAINST DEFORESTATION AND SOIL CONVERSION.

The support consists in a collaboration that led to the launch of the project "DCF (Deforestation and Conversion Free) Leather", focused on the bovine leather supply chains from Brazil.

The mission of the project is the conservation of the Amazon rainforest through the development of traceability standard of the hides/leather along the supply chain, to guarantee their origin from sources unrelated to deforested areas.

The standard also aims at increasing the level of transparency and improving governance of the supply chain and environmental responsibility. This multi-stakeholder approach incorporates DCF criteria into certification protocols of ICEC and CSCB traceability and recommends the inclusion of DCF principles in company sourcing policies and their raw material suppliers.



CHAPTER 7

THE ITALIAN LEATHER IS
SYNERGY



STRENGTHEN THE MEANS OF IMPLEMENTATION AND REVITALIZE THE GLOBAL PARTNERSHIP FOR SUSTAINABLE DEVELOPMENT



THE PARTNERSHIPS IN ITALY

Through the action of its representative associations, the Italian tanning industry has activated multiple collaborations with different players from the economic, institutional and civil sector.

A strategic union that sees in the sharing of objectives, knowledge and investments, the main road to progress towards the achievement of the SDGs.



INTERNATIONAL COLLABORATIONS

The Italian tanning industry has contributed to create and supports some initiatives in the framework of International collaboration, of which economic players, organizations and institutional representatives are part.

The areas in which it operates are diverse. The main ones are: International cooperation, the safeguard of the environment, scientific research applied to the sector and International promotion of the excellence of its own productions.



THE PARTNERSHIPS IN ITALY

THE IMPLEMENTATION OF SUSTAINABLE DEVELOPMENT GOALS IS STRONGLY RELATED TO A CONTEXT OF GLOBAL PARTNERSHIP BETWEEN STAKEHOLDERS.

This allows to mobilize and share skills and technologies and to ensure coherent growth policies.

In this context, UNIC plays an important representative role: it is an aggregate member of Confindustria Moda (Federation of Fashion Industrial Associations) and has intense collaborative relationships with other national associations related to the supply chain and the industrial panorama (ASSOMAC, Federchimica, UNPAC, AICC).

UNIC dialogues with research bodies, including the Italian Leather Research Institute and universities and carries out intense institutional relations with ITA (Italian trade Agency) and various ministries.

CONFINDUSTRIA MODA

Confindustria Moda (Italian Federation of Textiles, Fashion and Accessories) gathers member companies of SMI (Italian Fashion System), ASSOPELLETTIERI (Leather Goods Manufacturer Association), AIP (Italian Fur Trade Association), ANFAO (Italian Optical Goods Manufacturers' Association), ASSOCALZATURIFICI (Italian Footwear Manufacturers' Association), FEDERORAFI (Italian National Federation of Gold Jewellery – Silverware – Jewellery Manufacturers) and UNIC (aggregated member).

CHEMISTRY FOR THE TANNING INDUSTRY: SUPPLY CHAIN SYNERGIES FOR A MORE SUSTAINABLE FUTURE

In 2018, the Guidelines on eco-toxicological requirements for chemical mixtures and industrial wastewater were published, in collaboration with Aispec, the Association of Fine Chemicals and Specialized Sector of Federchimica (Chemical Industry Federation), and the main reference associations of Italian fashion (other than UNIC: SMI, Tessile e salute, CNMI). The document follows the Guidelines on eco-toxicological requirements for clothing, leather goods, footwear and accessories, published in 2016.



INTERNATIONAL COLLABORATIONS

UNIC HAS ESTABLISHED MANY PARTNERSHIPS AND COLLABORATIONS AT INTERNATIONAL LEVEL.

The strong internationalization of the tanning sector is also reflected in the participation in representative bodies of primary importance, both in the industrial sector (COTANCE, ICT) and on specific topics such as standardization, traceability and animal welfare, the environment, communication and promotion of product and process sustainability.



THE SOCIAL DIALOGUE

The European Social Dialogue Program with the participation of industrial and trade union representatives, aims at defining common actions on all social, ethical and environmental aspects involving the European leather sector. Initiatives relate to employment support, training and awareness on the topic of health and safety at work.

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