

2014 Sustainability Report



Unione Nazionale Industria Conciaria

UNIC

Unione Nazionale Industria Conciaria

The Italian Tanners Association is the greater national association in the world of the leather sector. It works since 1946 to promote the Italian Tanning Industry and it is the leader of a group of companies engaged in different field: trade fairs, scientific consultancy, stylistic trends, legislation, publishing and certification.

2014 Sustainability Report

ITALY'S tanning industry is the world's leading exporter of finished leather and, as such, also leads the world in an area that is perhaps less evident, but equally prestigious: its commitment to society and to the environment.

This second annual report on sustainability documents this fact.

A snapshot of Italian tanning in 2013 shows competitiveness expressed in close synergy with the entire international value chain, with society and with public authorities.

Of total turnover, 76% comes from exports and 94% of raw materials are supplied from outside Italy.

Both employment and turnover have increased from 2012 to 2013 (by 1.6% and 9%, respectively).

Our sustainability is based on production processes that promote the economy and which adopt the highest social and environmental standards.

For industry players, the doomsday forecasts of the much-touted global warming and the self-serving promotion of a vegetarian diet finalised to replacement of animal protein with alternative foods are expected to be the cause of enormous costs and to alter the orderly progress of humanity.

Nonetheless, we are able to look to the future with optimism.

Contents

The Italian tanning industry

- 07 Introduction
- 08 Regional figures
- 10 Production by animal type and destination sector
- 11 Export markets
- 11 Import markets (raw material)

The environmental sustainability

- 13 Introduction
- 14 The costs of sustainability
- 15 The consumption of resources
- 19 Waste production
- 20 Wastewater disposal
- 21 Atmospheric emissions
- 21 LCA and leather environmental footprint

The social sustainability

- 25 Introduction
- 26 Human resources
- 27 Labor relations
- 28 Health and safety in the workplace - Accidents
- 29 Relations with the community

The ethics of leather

- 33 The raw material
- 36 Traceability of raw hides and skins
- 36 Animal welfare
- 38 Transparency and country of origin
- 38 Leather product safety and consumer protection

The certifications

- 41 Introduction
- 43 The environmental certification
- 44 Financial and product certification
- 45 Social and ethical certification

Appendix

- 47 Code of Conduct and Social Responsibility
- 49 With the collaboration of



The Italian tanning industry

Introduction

IN 2013, Italy yet again confirmed its position at the top of the tanning industry, in terms of both quality and revenues (with 66% market share in Europe and 17% globally) and in terms of internationalization (with 30% of global exports of finished leather).

The industry has historically be made up of small and medium enterprises, which numbered 1,269 at the end of last year. Although this is a slight dip compared to 2012 (-0.8%), total jobs actually increased by 0.6% to 17,958. Volumes produced came to 129 million square meters and nearly 34,000 metric tons of sole leather for a total value of over €5.25 billion. The trends compared to 2012 are generally encouraging, posting growth in both value (+9%) and square meters produced (+2.4%), whereas there was a generalized, if fairly moderate, decline in sole leather (-1.6% in tons, -2% in value).

It was another year with a significant difference between the trends in value and in volume due to the continuing increases in the prices of raw materials (at an average of roughly 25%) and the consequent adjustment to sales prices.

A year of growth in both production value and production volume had not happened since 2010, but that was following the crisis of 2009. Before that, we go back to 2006 and then all the way back to 2000. The actual value of production is essentially in line with the pre-crisis levels of 2006-2007, whereas volumes have returned to levels last seen in the late '70s and early '80s. For the first time in 7 years, sales growth is equally divided between international markets (exports +8.6%) and the apparent domestic market (up 10%).

Regional figures

ITALY'S tanning industry has always been a typical example of the success of the district model that has traditionally characterized a significant portion of the nation's manufacturing economy.

Indeed, nearly all the sector (over 90%) is concentrated within regional production districts, which have, over the years, both developed their particular features in terms of product and process and adapted them to the needs of the market.

The leading tannery district in terms of production and workforce is in the Veneto region in the Arzignano-Chiampo valley in the province of Vicenza. The special feature of this tannery district, industrially speaking, is the presence of both small and medium enterprise and larger industrial groups that are at the cutting edge of process automation and standardization. In terms of production, the main specialization in this area are adult and mid-sized bovine hides mainly for upholstery (both car interior and furniture), footwear and other leather goods.

The district with the greatest number of tanneries is in the Tuscany region in the area of S. Croce sull'Arno, Ponte ad Egola and Fucecchio (provinces of Pisa and Florence). These businesses, which account for 28% of the nation's total turnover, feature a high degree of craftsmanship and versatility in production, which mainly goes to the high-end fashion industry. Processing mainly involves mid-sized and small bovine hides (including calfskins), many of which are used for sole leather, which, in Italy, is produced almost entirely in the areas of San Miniato and Ponte ad Egola.

In the Campania region, there is a tannery district specialized in small sheep and goat skins for clothing, footwear and other leather goods. The enterprises are located mainly in the Solofra area, near Avellino, with a number of major presences around Naples, as well. Leather production in the Campania region accounts for 9% of the nation's total in value terms.

The other region with a significant concentration of tanneries is Lombardy, mainly in the area of Robecchetto and Turbigo, a district specialized in small skins (typically sheep and goat) for the high-end fashion industry and which accounts for 6% of the nation's total production in value terms.

In 2013, all of these tannery districts posted increases in total sales and export, although performance levels varied from region to region.

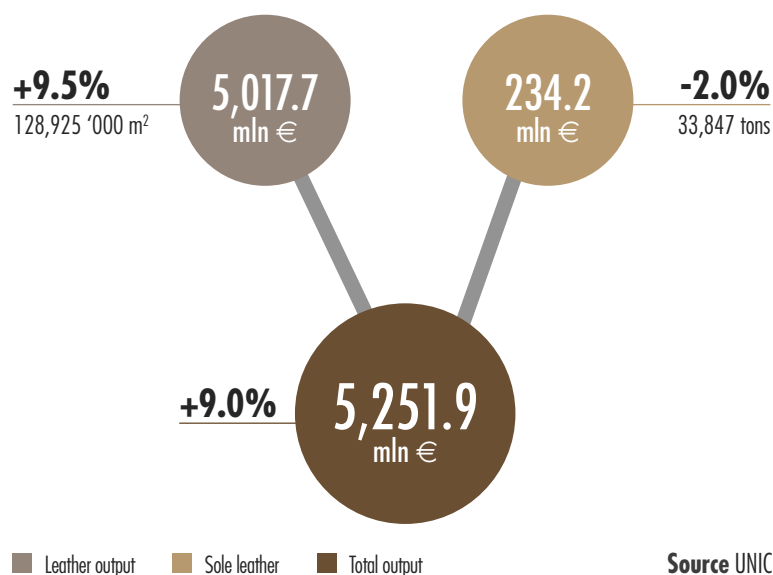
The Veneto region posted a 9.9% increase in production value, driven by exports (up 12.7%), and achieved a 52% share of the whole Italian sector. The Vicenza district continues to be the best performer on foreign markets, while domestic sales are undoubtedly less vibrant, although they did begin posting growth again (up 2%). The drivers of demand for this district were

most certainly the automotive and the leather goods segments.

Tuscany recorded an overall growth of 6.8% in value terms with exports rising by 2.2%. Sales of Tuscan leather were mainly driven by domestic customers (estimated at +17%), which are primarily represented by Europe's leading fashion brands and their Italian outsourcers.

Due to uncertainty in the sheep and goat segment, the Campania district was the one that posted the least rise in Italy. Nonetheless, growth was achieved, driven largely by exports, which continue, however, to have a relatively limited impact on local tanneries (at roughly 40%). Production values for tanneries in the Lombardy region registered marked growth thanks to continuingly strong ties to luxury goods customers.

Italian tanners' output 2013



Source UNIC

Italian tanning industry: data by district

2013

LOMBARDY

Bovine, sheep and goat leather for footwear and leather goods

Workers	1,045	(var. 12/13: +2.0%)
Tanneries	47	(var. 12/13: +2.1%)
Output	304 mln €	(var. 12/13: +14.8%)

VENETO

Bovine leather for footwear, furniture and leather goods

Workers	8,272	(var. 12/13: -0.6%)
Tanneries	468	(var. 12/13: -0.8%)
Output	2,732 mln €	(var. 12/13: +9.9%)

TUSCANY

Bovine leather for footwear and leather goods

Workers	5,795	(var. 12/13: +4.0%)
Tanneries	544	(var. 12/13: -0.9%)
Output	1,468 mln €	(var. 12/13: +6.8%)

CAMPANIA

Sheep and goat leather for footwear, leather goods, garments

Workers	2,041	(var. 12/13: -1.3%)
Tanneries	167	(var. 12/13: -1.2%)
Output	452 mln €	(var. 12/13: +2.3%)

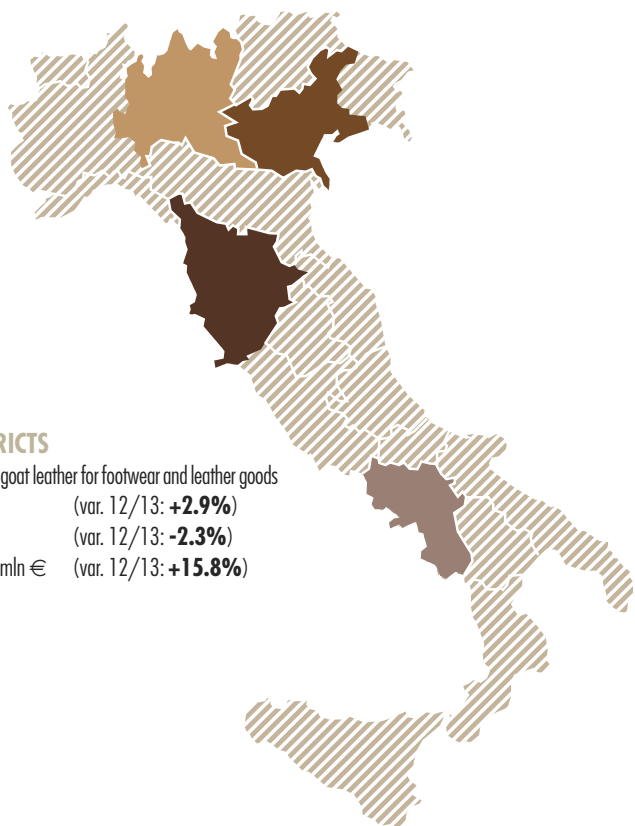
OTHER DISTRICTS

Bovine, sheep and goat leather for footwear and leather goods

Workers	805	(var. 12/13: +2.9%)
Tanneries	43	(var. 12/13: -2.3%)
Output	296 mln €	(var. 12/13: +15.8%)

Source

UNIC
ISTAT
Unioncamere
Movimprese



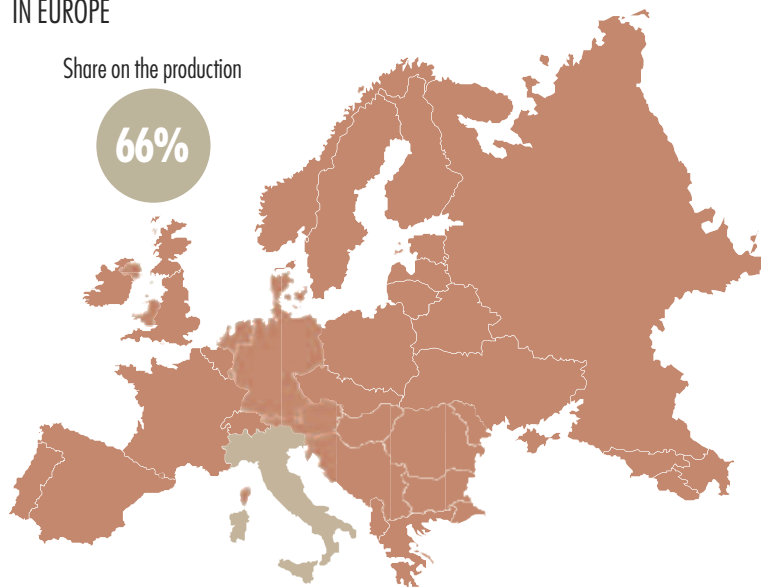
The value of the Italian tanning industry

2013

IN EUROPE

Share on the production

66%



IN THE WORLD

Share on the production

17%



Source

UNIC
UN
Eurostat
Industry Associations

Share of exports of finished leather **30%**

Share of imports of raw hides and skins **17%**

Share of imports of semi-processed leather **23%**

Production by animal type & destination sector

ITALY'S tanneries mainly process hides and skins from bovines, sheep and goats, the availability of which is tied to trends in slaughtering and, consequently, to the consumption of meat. Adult and mid-sized bovine hides account for over 70% of total production volumes, followed by sheep, goat, and small and young bovine (i.e. calf) skins. Less than 1% is made up of other animal types (swines, reptiles, deers, kangaroos).

Economically speaking, 2013 was a decidedly good year for bovine leather and for the minor category of "other animal types", the latter of which driven by the reptile segment. These categories posted significant gains both in volume and in value terms, whereas for calfskin and, above all, sheepskin leather, the excellent performance of sales was not equally reflected in volumes (and so would appear mainly attributable to the rise in sales prices due to the rise in raw material costs). Finally, performance for goat leather was disappointing.

All animal types posted increases in average sales prices of around 7%, but with significant differences from one segment or product niche to another. For certain high-end segments where demand is particularly strong, these increases exceeded 20%. This trend is explained by the need to adjust sales prices in response to increases in the cost of raw materials, but without causing sudden, excessive imbalance in the delicate dynamics of supply and demand.

The leading users of Italian leathers fall within two main categories: the fashion industry (i.e. footwear, clothing and other leather goods) and the upholstery segments (both furniture and car interiors).

The destination sector that purchases the greatest number of square meters of leather has traditionally been footwear, with 43% of Italy's leather production currently going to this segment. The second leading use is leather goods, which is the target segment that grew the most last year. This was followed by upholstered furniture, which, after the explosive growth of the 1990s, posted a gradual, yet decisive adjustment in terms of demand and consumption, and then by the car-interior segment, which is growing rapidly. Trailing these segments was garment, which has been waning in recent years due, above all, to relatively unfavorable trends in fashion.

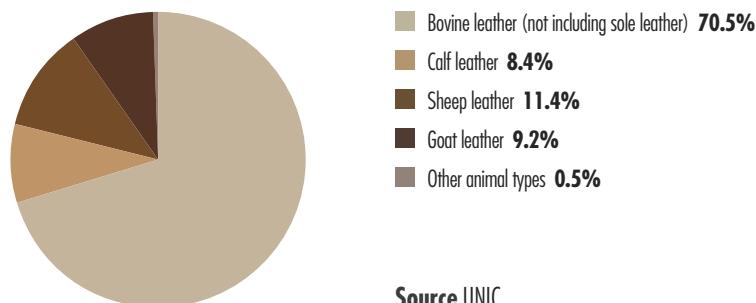
An analysis of Italy's tannery production for 2013 by destination sector points to great diversity in performance.

Automotive posted growth (+13%) for the third year in a row, driven by the increasing use of leather in luxury vehicles, as did the leather goods segment (+14%), which recorded its eleventh year of growth over the last fifteen years. Footwear slipped slightly (-0.9%) due mainly to a disappointed second half of the year.

Leather for furniture also continued to decline, with current production volumes at less than half of 2006 levels (having fallen just about constantly since that year). In addition to a certain dullness in consumption, this segment was affected more than the others by the continuing increases in raw material prices given the greater difficulty in transferring these cost increases down the value chain and the greater ease with which customers can replace leather with alternative materials. Garment leather also continued to register declines.

Production by animal type

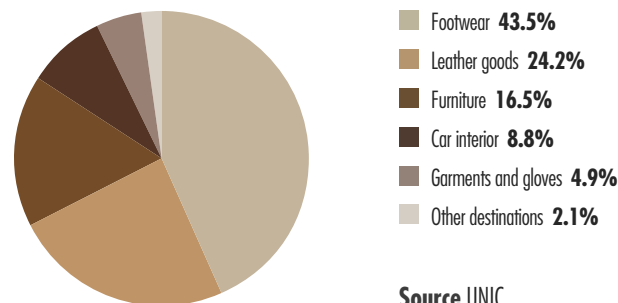
% rate in volume (2013 - m²)



Source UNIC

Production by destination sector

% rate in volume (2013 - m²)



Source UNIC

FOREIGN markets have been a key factor in the growth of the Italian tanning industry for many years. Their contribution to total revenues has grown enormously and currently accounts for over three-quarters of the aggregate (76%) in terms of “apparent weight”. Historically, this percentage has risen gradually, but constantly, fluctuating at around 30% during the 1980s before reaching 50% by the mid-1990s and breaking through the 60% threshold with the arrival of the new millennium.

In 2013, Italian exports of leather (including types with hair-on) to 123 nations totaled €4.01 billion, up 8.6% from the previous year, for the second highest level all-time after the record hit in 2001.

The European Union is the main target market, accounting for over half of all Italian exports. The importance of the EU region has declined slightly over the last two years, but in previous years it had returned to growth after the gradual decline seen on the cusp of the new millennium due to a mass shift in global production towards Asia. The EU is followed by the Far East (27.5% of the total), Russia and the Balkans (7%), and the NAFTA region (6%). Performance for last year was positive on the whole for all destination markets, with the sole exception of secondary destinations (Africa, etc.), which lost 4%. Shipments to the Far East, North America and the Russia-Balkans region posted double-digit growth, whereas growth in the EU was more moderate, particularly towards the traditional core target of the EU-15 nations.

In terms of individual target nations, China (including Hong Kong) has been the leading foreign destination for Italian leather for twenty years now. The value of exports to this country grew by 14% last year to approach all-time highs and take its current contribution to total exports to 20%. Of the other leading destinations, those that posted the greatest growth were the U.K. and Poland (+19% each), the U.S. (+17%), and Portugal (+12%). For the U.S. and U.K., this was the fourth year in a row of double-digit growth (with current values more than doubling since the crisis of 2009), while Poland and Portugal have reached record levels of exports. Growth was also posted in Romania (+3%) and Spain (+4%), whereas declines were seen in exports to France, Germany (-2% each), and Tunisia (-4% for the third consecutive year of decline). These 10 markets account for two-thirds of all exports.

THE INDUSTRY'S leading raw materials are raw hides/skins and semi-processed leather (wet blue and crust), and supplying strategies and trends are key factors in business management and commercial competition. Given the limited level of Italian livestock, the needs of Italy's tanning industry are structurally covered to a minimal extent (6% in 2013) by domestic animals, with the remainder coming in the form of imports.

In 2013, Italian tanneries imported 855,000 metric tons, up 4% from the previous year, from 122 nations. This aggregate figure includes raw hides/skins (462,000 tons, up 1.5% from 2012), wet blue (382,000 tons, up 16%) and crust (10,000 tons, up 37%) leathers. In terms of relative importance (i.e. in volume of “equivalent raw hides/skins”), the most important raw material used by Italian tanneries is wet blue (at 60% of the total), followed by raw hides/skins (38%) and crust (2%).

The European Union, which has historically been the leading basin of supply for Italian tanneries, provided 54% of the raw material imported, followed by Latin America at 21%. A lesser, but still highly important role was played by NAFTA nations (6%), Oceania (6%), Russia (5%), Africa and the Middle East (5%), and Asia (3%). This breakdown, which undoubtedly undergoes changes from one year to the next, has not shifted significantly during the recent period.

Compared to 2012, double-digit growth was posted in volumes purchased from Latin America, Russia, Oceania and Asia, while the EU, NAFTA and Africa/ME posted more moderate increases (between 1% and 4%).

* raw hides/skins and semi-processed leather



The environmental sustainability

Introduction

ITALY'S tanning industry has, for some time now, seen protection of the environment as an integral part of business growth.

Indeed, environmental sustainability is now an important aspect of development, particularly in districts where synergies between business and the authorities has made it possible to achieve well-respected levels of excellence, as seen in the evaluation of the three tannery districts in the latest report on Italy's manufacturing districts published in 2013, in which the tannery districts in S. Croce (Tuscany), Arzignano (Veneto) and Solofra (Campania) ranked third, fifth and sixth.

This important recognition for Italy's tanneries reflects their widespread commitment to constantly improving in terms of environmental performance, particularly in the form of district-wide environmental certification and the creation of infrastructures to manage the most important environmental aspects, such as waste and water management.

The tanning industry's commitment to the prevention and reduction of pollution is exemplified in the trends in a number of indicators and in many of the related physical and financial figures, which point to the environmental efficiency achieved in production processes and to the investment needed to manage such processes. Indeed, in recent years environmental costs have taken up a significant portion of tannery revenues, which is the only rising trend of the primary indicators considered.

The costs of sustainability

OVER THE YEARS, Italian tanneries have achieved remarkable levels of environmental performance thanks to the active cooperation of all players throughout the industry.

In 2013, tanneries further reduced their consumption of both water and energy. In waste management, they have developed a highly efficient system of waste recycling, just as they have done in waste-water treatment.

The number of tanneries that have adopted internationally certified environmental management system are on the rise, supported by the efforts of the tannery districts. Companies are increasing their levels of investment in the research and development of new products of lower environmental impact, which is being backed by more detailed analytical check.

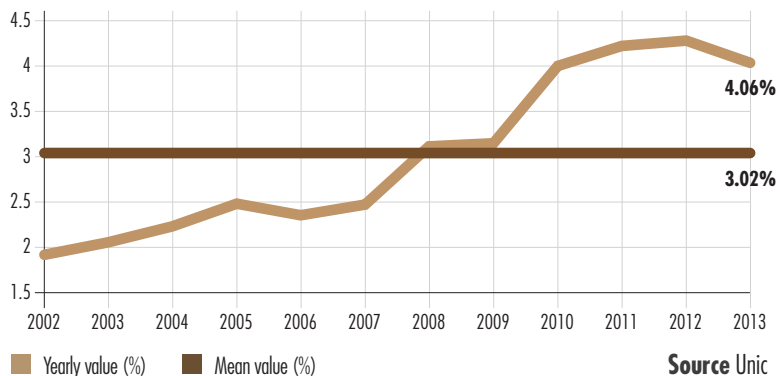
For Italian tanneries, the results being achieved are examples of excellence in terms of the quality of the products being provided to an increasingly demanding marketplace.

The results achieved in terms of minimizing impact on the environment and on the community are the fruits of the commitment and determination of each individual company and of the industry as a whole, as shown in the ratio of environmental costs to total production, which has increased exponentially over the years until 2012.

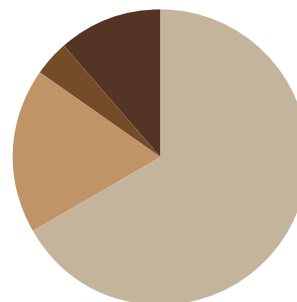
In 2013, this ratio actually declined due, above all, to increases in production.

Ratio of environmental costs to total turnover 2002-2013

In 2013, the share of environmental costs on turnover amounts to 4.06%, decreasing respect to the previous results



Environmental costs by type 2013

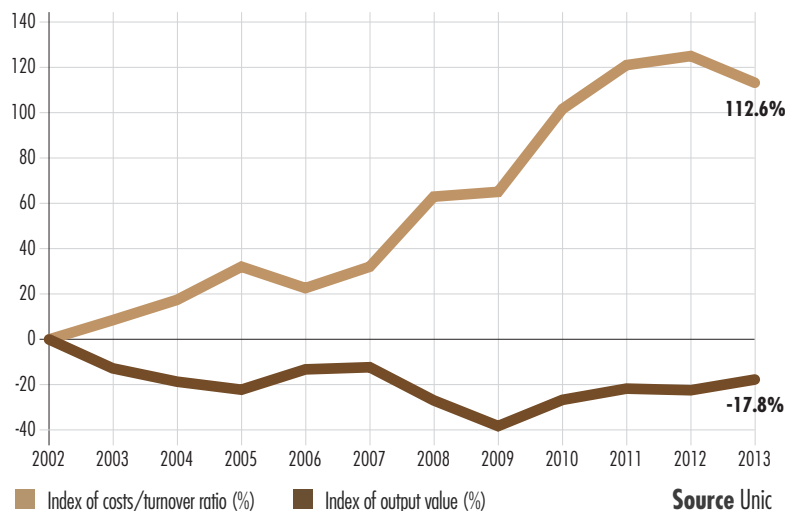


The water cycle, in particular the wastewater treatment is the most significant cost item. The costs for the waste management account for almost one fifth of total costs. In 2013 there was a significant increase of the incidence of "other costs", which include the costs related to environmental certifications and the investments in research and development.

Source Unic

Trend of share of environmental costs on Turnover / Output value 2002-2013

From 2010 to 2012 environmental costs have increased exponentially and independently from production. In 2013, mainly due to increased turnover, the gap between the two indicators has reduced. The growth of the environmental costs compared to the first year of data collection (2002) amounts to +112,6%.



The consumption of resources

THE TANNING industry uses **raw hides and skins** which are largely (99.5% in 2013) a byproduct of meat production (i.e. cow, sheep and goat hides) and so are a renewable resource that tanneries recycles, rather than having the hides disposed of as waste.

The transformation of these raw hides, which decay rapidly given their organic nature, into a raw material that can be used to manufacture leather (for footwear, leather goods, car interiors, etc.) requires the use of natural resources either directly (such as water and fuel) or after a process of transformation (e.g. electricity or chemicals).

The most significant resource used in the tanning process is **water**, which is the primary resource used in most of the tanning processes. Water is also used to wash the hides, the machinery and the workplace generally.

The amount of water consumed by tanneries depends largely on the mix of raw materials used. Tanneries that carry out the complete tanning process post greater figures on the whole than those that use semi-finished goods, such as wet-blue hides, given that some 60-70% of the total water used in production is needed for the initial stage of the process.

Tanneries get most of their water directly from authorised artesian wells. The remainder is obtained through agreements with industrial and civil aqueducts, but the share of total water consumption varies significantly depend-

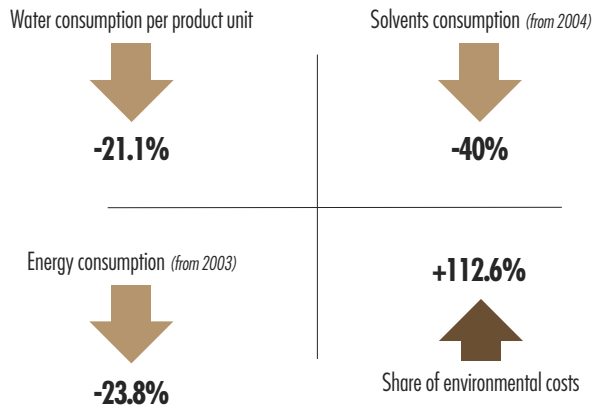
ing on where the tannery is located. Consumption figures have been obtained from the tanneries based on meter readings from their wells and/or of the industrial aqueducts used and so can be considered to be accurate.

The gradual **reduction in consumption** per unit produced, which has fallen **21% since 2002**, has been achieved through investments to develop efficient processes, machinery that uses less water, and processes to monitor and control consumption and waste, including losses from the distribution system.

Chemicals are used in the various stages of the production process in order to preserve the hides and give them the look and performance required by the market.

Main trends

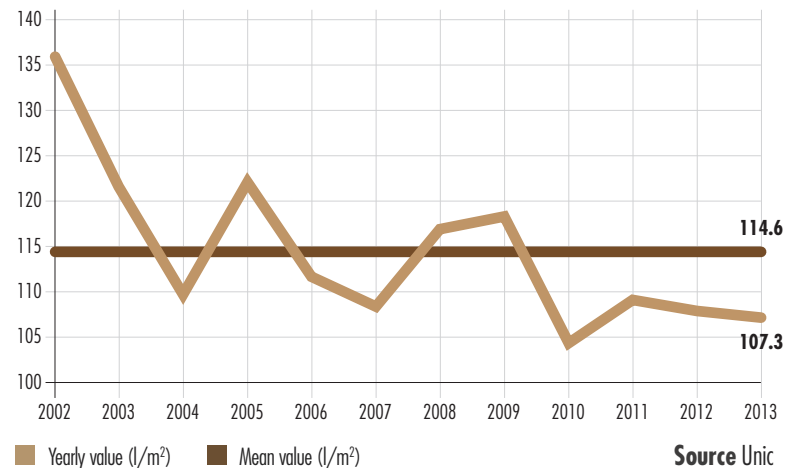
2002-2013



Water consumption per product unit

2002-2013

The trend of water consumption per product unit is constantly decreasing. In the 12 years of investigation, the average value amounted to 114.6 l/m². In 2013 the average water consumption per square meter of leather produced was equal to 107.3 liters, in the further slight decrease compared to 2012.



The quantity of chemicals used to produce one square meter of leather depends on the type of raw material used (i.e. raw hide and skins, wet blue or crust) and the article, particularly due to the various types of finish and effects.

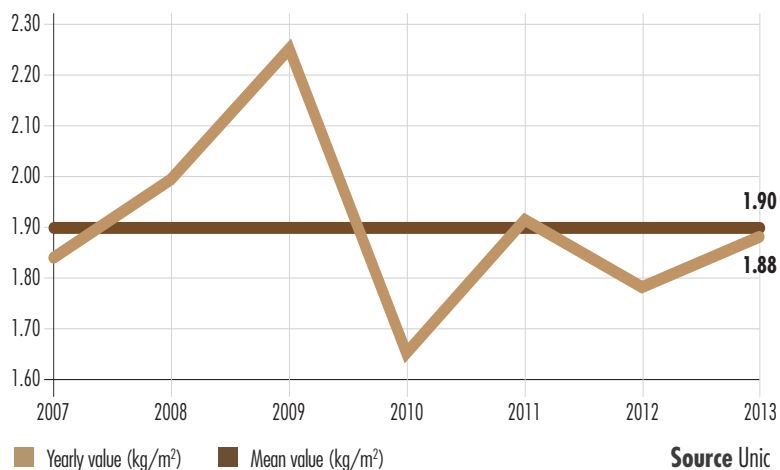
Thanks in part to the consistence of the composition of the sample population for the period under review, the consumption of chemicals per unit produced remained largely unchanged in 2013 compared to the average of previous years.

In 2013, given the close collaboration within the value chain between tanneries and their providers and the intensive research and testing being conducted, Italian tanneries have made significant levels of investment to develop chemicals that are increasingly effective at ensuring material performance and that are sustainable both in terms of processing (and so with greater yields) and in terms of the chemical characteristics of the articles produced.

The tannery industry paid especially close attention to reducing the

Consumption of chemicals per product unit 2007-2013

In 2013 the quantity of chemicals used for the production of a square meter of leather was equal to 1.88 kg. The figure remained essentially constant over time.



consumption of energy in 2013, given the rising consumption seen in recent years.

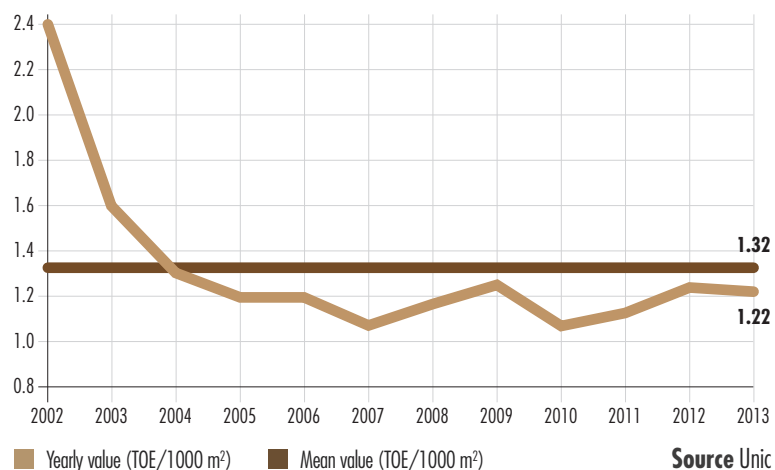
Today, many tanneries have achieved high levels of energy efficiency, and the rest have begun efforts to update their technologies so as to consume and waste less energy, while also achieving, in some cases, significantly greater productivity.

The work being done, which resulted in a 1.6% reduction in energy consumption (expressed in TOE) compared to 2012, concerned the replacement of old boilers with high-efficiency systems, a more efficient use of motors by installing inverters, and the rationalization of energy use by certain machinery. Significant levels of investment are also going to plant and systems through the development of cogeneration systems that make it possible both to make use of the energy generated and to recover a large part of the heat that would ordinarily be lost to the environment by traditional combustion systems.

As with other aspects involving the consumption of resources, energy consumption depends a great deal on the type of production process concer-

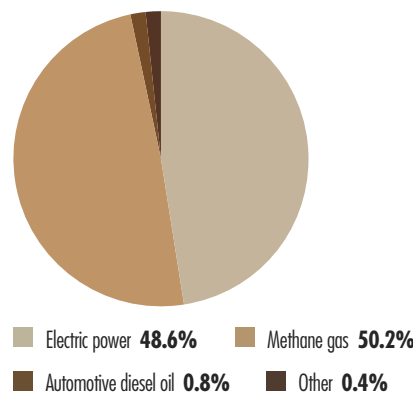
Energy consumption per product unit 2002-2013

The average power consumption in 2013, decreased by 1.6% over the previous year. 1.22 TOE is the total consumption indexed to the annual leather production of sample.



ned. Indeed, tanneries that conduct the entire production process from raw hides use both heat and electricity, whereas those that only handle the portions of the total process that do not involve any wet work primarily consume electricity. Therefore, national average figures provide an indicative number that depends on the given production mix. A lower consumption of resources, and of petroleum products in particular, translates into lower indirect emissions of pollutants, lower heat emitted, and lower emissions of CO₂ per unit produced.

Energy consumption: breakdown by type anno 2013



The energy consumption broken down by type of energy source is almost equally divided between electricity and natural gas. Significant in 2013 was the increase in the relative share of natural gas (+15.9% compared to 2012) due both to the cold winter and, marginally, the greater use of cogeneration systems.

Source Unic

ENERGY EFFICIENCY IN THE LEATHER SECTOR

IND-ECO Project



The Industry Alliance for Reducing Energy Consumption and CO₂ Emissions (IND-ECO) was launched in 2012 and is being coordinated by UNIC. This three-year project, which falls within the scope of the “Intelligent Energy - Europe” program and is being supported by the EU’s Executive Agency for Competitiveness & Innovation (EACI), has the goal of creating the best market conditions to facilitate investment in energy efficiency by tanneries and the entire leather value chain, with a particular emphasis on the footwear industry.

The results achieved in the first 18 months of the project have made it possible to fine-tune the mechanisms needed to support businesses in assessing their own performance in the use of energy and in evaluating any investments they should make in energy efficiency.

The project has four main objectives:

- to identify, by way of energy audits, the main areas of improvement in energy efficiency within tanneries and the value chain;
- to identify the best technical and technological solutions available within Italy and throughout Europe in order to pursue energy efficiency;
- to develop agreements with investors and financiers in Italy and the rest of Europe in order to obtain the capital needed for business investments;
- to assist businesses in developing plans to invest in energy efficiency.

The project will give businesses the possibility to:

- have advisory services provided free of charge by industry experts and energy efficiency specialists in order to conduct in-depth technical and technological studies aimed at identifying potential steps to improve energy efficiency and at quantifying related savings;
- consult a specific database of energy-efficiency technologies, processes and systems;
- receive advice on how to obtain subsidized credit in order to make investments in energy efficiency;
- receive assistance in evaluating and carrying out investments in order to properly plan projects and optimize the use of resources.





Waste production

THE INTERNAL organization of the tanneries, the level of specialization of the waste management facilities, and the organic nature of a large part of the waste make it possible to achieve excellent levels of performance in waste management.

Only a portion (roughly 30% by weight) of incoming skins leaves the tannery in the form of a finished product. The remainder of the organic material is discarded during processing, and this waste is disposed of in various ways depending on the stage in which the waste is generated.

More specifically, certain waste that comes from the initial stages of the process (up until liming), such as raw hide trimmings, flesh, hair and other solid matter, can - if properly controlled and handled - be considered to be animal byproducts and so not classified as waste by prevailing laws and regulations. As such, they may be used in the production of animal feed, fertilizers, soil improvers, compost, biogas, gelatins and more.

Differentiated waste collection, which is currently at 90%, makes it possible to preserve the technical characteristics of the various materials so that they can be used in the recovery processes carried out by specialist firms. In

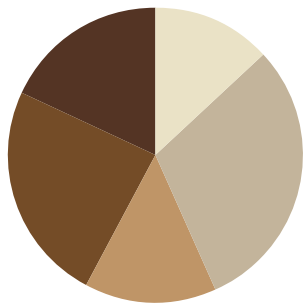
2013, 70% of the waste produced was recovered in this way.

Certain specific treatments are carried out within the districts by centralized plant. The treatment of tanning liquor containing chromium makes it possible to recycle a portion of the chromium (III) found in the tanning waste. The recovered chromium is mixed with other "freshly" acquired basic chromium sulfate and then reused in production.

In 2013, an average of 1.7kg of waste per square meter was produced.

Waste management costs accounted for 18% of all environmental costs in 2013, with contracting to specialist waste management and recovery facilities accounting for roughly 94% of such costs.

Composition of typical tanning waste 2013



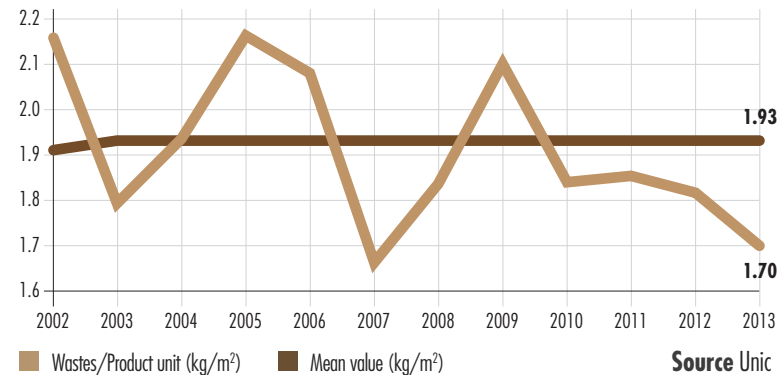
Shavings, spetches and trimming representing the most significant shares of the waste produced (30%). With a distinction for companies that perform the complete cycle for which the fleshing represents a major share of the total waste produced. The second entry for significance includes a mix of specific waste of tanning production including the tanning liquors. The "other" item gathers packaging (80%) and unsorted wastes.

- Fleshings **13.2%**
- Sludges **14.5%**
- Other waste **17.9%**
- Shavings, spetches and trimming **30.3%**
- Other specific tannery waste **24.1%**

Source Unic

Waste production per product unit 2002-2013

The trend of the indicator shows a steady decrease of the quantity of waste generated by the tanning processes per unit of output, even for the increasing share of wastes valorised as a byproduct.



Source Unic

Wastewater disposal

WATER MANAGEMENT, and the various wastewater treatment in particular, is the most important environmental aspect for the tanning industry.

Nearly all of the firms located in the main tannery districts send their wastewater to consortiums, which have historically also contributed to purifying the municipal water of the communities in which they operate.

Tanneries not located within industrial districts handle wastewater treatment themselves by discharging wastewater into the public sewage systems or into treatment plants specialized in handling industrial waste.

The collective management of water treatment provides competitive advantage to the tanneries in that it optimizes both the treatment itself and the related costs.

The wastewater treatment consortia in the tannery districts also set an example internationally of intercompany cooperation for environmental sustainability. Constant investment, local and national accords, and other research and innovation have helped tanneries to optimize the treatment of wastewater and sludge. The water treatment facilities have continued to evolve in Italy's various tannery districts right from the very beginnings of industrialization in the field. Roughly, 93% of the water consumed by tanneries is then discharged as wastewater. The remainder comprises the moisture that remains in the leather, water that evaporated during production, or water contained in other waste to be treated.

Tanneries themselves remove the larger particles from the water and conduct

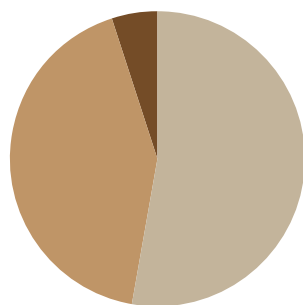
some pretreatment before sending the wastewater out for treatment.

For this reason, in order to render the data more meaningful, the impact indicators related to water discharge and treatment include the figures provided by the wastewater treatment consortia, which receive and treat the wastewater from some 600 tanneries in the Veneto, Tuscany and Campania regions.

Some 42% of the water arriving at the purification plants is municipal water, while over 50% comes from the tanneries. Residual portions of other wastewater or other liquid industrial waste (leachate) make up the remainder of the incoming waste. Analyses of treatment efficiency are conducted based on the main parameters characterizing tannery wastewater: suspended solids, COD, total nitrogen, chromium III. Because chlorides and sulfates cannot be effectively removed through water purification processes, steps have been taken upstream using specific, simple and financially sustainable technologies in order to reduce their presence in a tannery's wastewater. In order to reduce chlorides, salt in particular is removed mechanically (by shaking), and its use in production has been reduced. As for sulfides, their use has been rationalized in the most critical phases of the process, while also improving their yield.

The incoming waste water to treatment plants: breakdown by type

2013



In the tanning districts, the wastewater purification operated by centralized plants concerns not only tanning wastewater but also the civil wastewater of the territory.

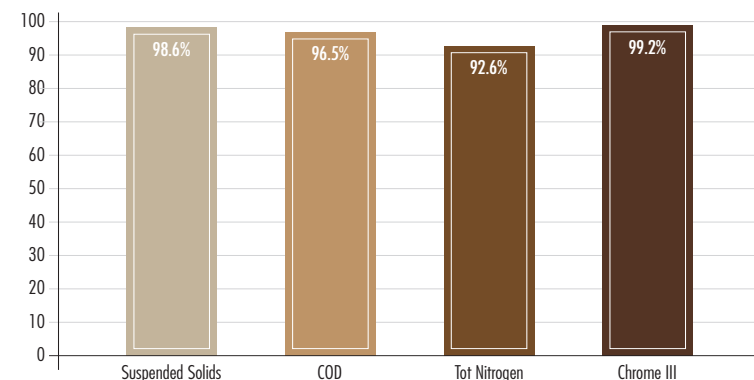
Industrial wastewater from tanneries **53%** Civil wastewater **42%**
Other (Other industrial wastewater, percolates, etc.) **5%**

Source Unic

Reduction of pollutants in wastewater

2013

The average data for the purifying efficiency of the district plants, in terms of ratio between the concentration of the pollutant in the output and in input to the treatment system, amounted to values substantially constant, greater than 90% for all parameters considered. For chromium, the percentages of removal totaled over 99%.



Source Unic

IN A TANNERY, the primary parameters that affect air quality are volatile organic compounds (VOCs), hydrogen sulfide and nitrogen oxides. VOCs are mainly used in leather finishing, i.e. the final stage in the tanning process which determines the articles particular characteristics.

The quantity of solvents used and the consequent level of emissions vary depending on the article produced, its end use, the mix of chemicals used, and the technologies applied.

The most common finishing technique is spraying, which is done in closed chambers and using depression aspiration in order to prevent chemical agents from entering the workplace. Large part of the emissions are treated with specific emission-reduction systems, typically water-based scrubbers.

The use of organic compounds has been gradually declining since 2004 when Italian ministerial decree no. 44/2004 went into effect and introduced an emission threshold calculated in terms of the consumption of solvents in relation to the number of square meters produced.

On average in Italy, this emission indicator for VOCs is 68.4 grams of solvent per square meter of leather produced, which is a decline of 30-40% since 2004, although this varies significantly from one district to another.

Emissions of hydrogen sulfide (H₂S) have remained virtually constant and insignificant at a level well below the legal limit thanks to the safety measures adopted in drum aspiration and to the efficiency of the emission-reduction systems.

Some odor does remain and is impossible to eliminate given that the human nose is able to perceive concentrations over a thousand times lower than the legal limit.

Air pollutants per product unit 2013

COV* 68,4 g/m² **NO_x** 0,70 g/m² **H₂S** 0,05 g/m²

* Emission factor

When developing a global approach to environmental sustainability, environmental assessments that use an overall approach based on the entire life cycle and which take account of aspects such as air and water quality and soil protection, have become particularly important. These systems bring together a variety of other aspects, as well, including: the reduction of waste, energy savings, the management of natural resources, protection of the ozone layer, environmental safety, and the impact on biodiversity.

This sort of life-cycle assessment (LCA) is also used as the basis for determining the environmental footprint of a product, expressed as the quantity of a certain indicator per unit produced (e.g. kg of CO₂/m² of leather, liters of water consumed/m²), which provides a simple way of informing the consumer of the overall environmental impact required to produce a given good or service.

THE SINGLE MARKET FOR GREEN PRODUCTS



Pilot "Leather"

UNIC is involved in the pilot project "Building the Single Market for Green Products - Facilitating better information on the environmental performance of products and organisations" being promoted by the European Commission in order to establish the guidelines for life-cycle assessments and calculating a product's environmental impact and to establish product category rules, so as to ensure a greater disclosure of performance that has thus far not been possible due to the extreme variability of results because of the differences in calculation methods and in the databases available.

Within the scope of this initiative, which encompasses a range of industries, UNIC, together with COTANCE, is coordinating the Leather working group, which is responsible for gathering data and calculating the environmental impact - in terms of the product carbon footprint (PCF) and the environmental footprint (EFP) - of leather to be used in footwear, furniture, and so on.

This work encompasses the entire value chain, from the raw hides to the final product. The results are to be used by the Commission as a benchmark for the entire industry throughout Europe.

The environmental footprint of leather, calculated accordingly to the international standard ISO 14040, includes the impact not only of the tanning process, but also of all upstream and downstream activities, involved in creating the final product.

Given the growing importance of the life-cycle assessment in determining a product's environmental compatibility, UNIC has taken steps to define the appropriate method for calculating the environmental footprint of leather goods and for gathering the related data.

Of particular note in 2013, among the efforts underway that concern Italian

tanneries at both the domestic and European level, were the following: participation in the European pilot program (see below), the preparation of the product category rules (PCRs) within the context of CEN (of which UNIC is the Technical Secretariat of standards) to standardise the PCF of finished leather, so as to be an objective means of verification, both by certifying bodies and other third-party entities; and the collection of data in order to calculate the benchmarks for the various types of leather goods by intended use with the help of a representative sample population of firms.

SYSTEM BOUNDARIES

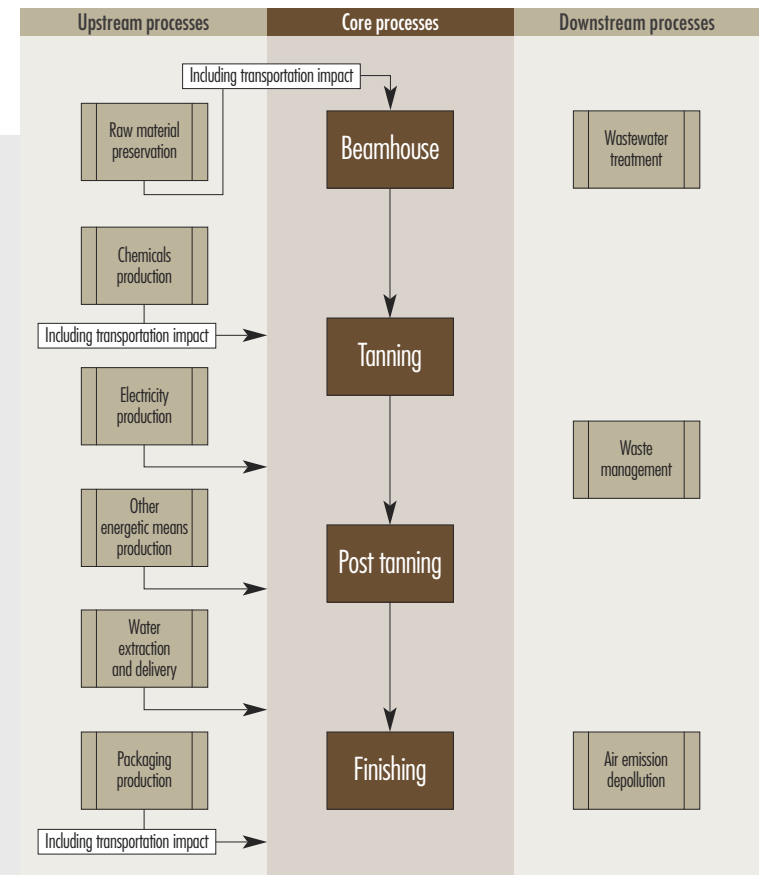
In 99% of cases, raw hides are a byproduct of the food industry that is transformed into a long-lasting, high-value product, rather than being disposed of as waste.

As such, the market availability of leather depends on the level of livestock slaughtering for food purposes and is in no way affected by the needs of leather manufacturing, given that the amount of livestock raised and slaughtered is a function of the needs of other industries (e.g. meat, dairy, wool, etc.).

Therefore, methodologically speaking, it is not appropriate to allocate a portion of the environmental impact of farming and livestock to leather, but rather to the primary product that determines the purpose of the activity, and this is a position that is shared by the world's leading producers of meat and raw hide.

For the tanning industry, the "system boundaries" that determine the processes that are to be included in the LCA process and, consequently, in calculating the environmental footprint, and so from the first stage of the product (the "cradle") to the final stage (the "grave"), must start from the moment in which the hide is removed from the animal, thereby excluding the processes upstream from the tanning process, i.e. farming and the raising of the livestock, which can, in certain cases, account for up to 80% of the carbon footprint and up to 99% of the water footprint.

This is due, in part, to the fact that the additional impact of raising the livestock would result in a competitive disadvantage for leather, a renewable resource, given that it is a natural resource which can be reproduced through biological or other natural processes over time, unlike other, non-renewable materials (such as synthetics).







The social sustainability

Introduction

THE SUSTAINABILITY of the tanning industry, as well as in financial terms and in terms of environmental protection, comes down to the promotion of the social relations between the various stakeholders - the workers first - and to the development of the territory and communities in which the businesses operate.

In presenting the tanning industry's approach to social responsibility, the most significant aspects concern the tanneries' human resources, the good relationship established with the social partners, the projects realized in 2013 dedicated to young people, the cultural initiatives, the promotion of sustainability throughout the value chain.

Within the tanning districts in particular, but not only there, tanneries play an active role in the development of the socioeconomic context in which they operate by creating jobs and financial wellbeing, promoting initiatives that benefit the community.

The companies pursue this commitment with the help of their local and national industry representatives and through constructive relations with the government institution.

Human resources

THE PEOPLE who work in a tannery are a resource of strategic importance for that companies.

This can be seen in the data on the types of employment contracts, which point to substantial stability in the employment relationship with over 85% of employees being on permanent contracts. The use of other types of contracts (training are temporary contracts), in the 2013 has remained virtually constant in percentage terms.

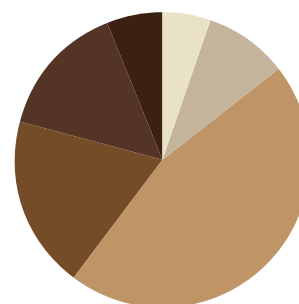
The organizational structure of tanneries has also remained essentially unchanged. As in other manufacturing industries, the tanning industry features a high degree of blue-collar workers (75.6%), a significant presence of office workers, and a low percentage of middle and senior staff. There is also a certain number of “intermediate” positions, roles of great skill and experience who work directly in production to oversee the product and production processes.

A breakdown by age group shows a concentration of employees between 30 and 45 years of age. People younger than 30 years of age account for 14.7% of the total, while one-fifth of all employees are over 50.

Training plays an important role in the development of human resources, particularly in the development of the skills needed in order to face the challenges of the marketplace, which is something on which tanneries are increasingly focusing both time and resources.

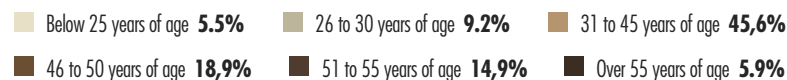
In 2013, an average of 6 hours of training per employee were provided. Of this training, 70% concerned health and safety in the workplace, while 30% involved the development of job skills.

Age groups 2013

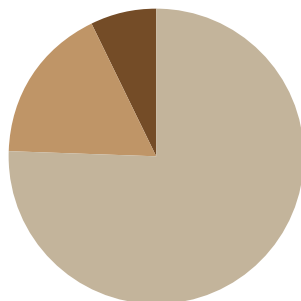


The breakdown of employees by age group shows a concentration in the range age 31-50 years. The working population with more than 50 years accounts for a fifth of the total.

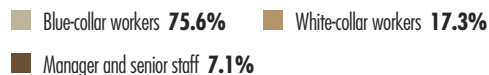
Source
Unic



Organization's structure 2013

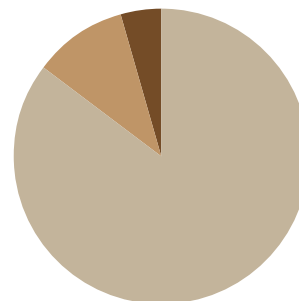


The composition of the staff in the tannery showed a high incidence (about 75%) of work force employed to productive activity, in continuity with the previous surveys.



Source Unic

Type of employment contracts 2013



The percentage of workers employed for an indefinite period confirms a good stability of labor relations. In 2013 the fixed-term contracts increased slightly as a percentage of the total. The portion relating to other types of contracts (apprenticeship, training contract, project-based contract) remains marginal. In Tuscany, the use of workers with “staff-leasing” contracts increased moderately.



Source Unic

THE TANNERS associations and the trade unions have developed a beneficial social dialog that includes various opportunities for interaction and other initiatives aimed at promoting the competitiveness of the tanning industry and developing its commitment to social, ethical and environmental issues.

This collaboration is contributing to improving the leather industry's position with respect to the global competition and to promoting social values surrounding Italian leather on the world's markets.

The Italian collective bargaining agreement, which was renewed in July 2013, underscores the constant focus on ethics, sustainability and social responsibility.

When renewing this agreement, the trade unions (FILCTEM-CGIL, FEMCA-CISL, UILTEC-UIL) approved of UNIC's code of conduct and social responsibility and recognized its usefulness as a means of developing and pursuing the proper handling of issues related to corporate social responsibility and of communicating guiding principles and performance to all stakeholders, while actively engaging the workers. The adoption of the UNIC's code gives firms the ability to establish in-house agreements that take full advantage of their

workers' efficiency and engagement.

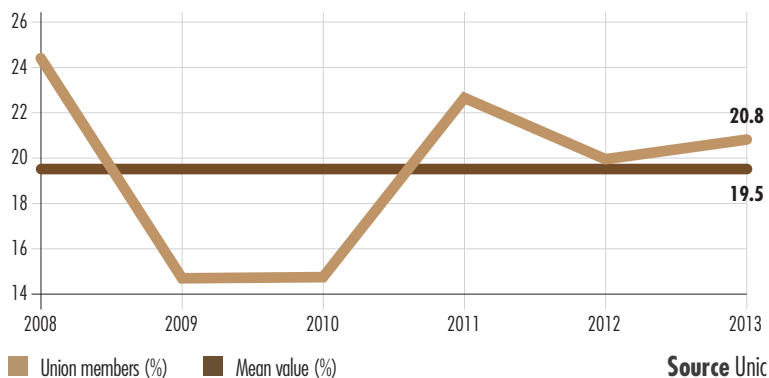
In the collective bargaining agreement, the parties further emphasized the constant commitment of the leather sector to the promotion of sustainability, including sustainability as an additional parameter in the bonus mechanism, which grants incentives to employees when the company obtains ICEC certification regarding aspects related to the environment, health and safety in the workplace, product quality.

The collective bargaining also underscores the importance of training as a key factor in the development and competitiveness of the industry's businesses and points to the need to promote joint efforts to development training opportunities and the continuing qualification of the employees. In order to ensure the availability of jobs for young people and of qualified resources to carry out those jobs, the trade unions have, been promoting dialog between schools and the business world at the local, national and European level. In the 2013 renewed collective bargaining agreement, both the tanneries and the trade unions formally recognize the importance of industry-specific technical education.

Union members

2008-2013

The percentage of unionized workers remained almost constant at around 20% without significant changes in recent years.



EUROPEAN SKILLS COUNCIL

Textile, clothing and leather



THE ITALIAN tannery observatory established by the trade unions and UNIC participates at the activities of the European Skills Council Textile-Clothing-Leather (ESC-TCL), which is a project promoted within the scope of European social dialog in order to improve education, skills and employment in these three industries by focusing on issues such as the training, qualification and skills of Europe's workforce and the attractiveness of the industries to young people, while providing the needed support to businesses so that they can be more flexible and better able to meet the changing needs of the international marketplace. The National Tannery Observatory provides advisory services to the Skills Council in relation to the needs and interests of the tanning industry, including the provision of information on industry policy and defining strategies and actions concerning education, training and job qualification.

Health and safety in the workplace - Accidents

HEALTH AND SAFETY IN THE WORKPLACE is a fundamental issue that the tanning industry promotes on a daily basis through the adoption of the proper technical, organizational and management measures needed to reduce the risks associated with the job and to improve the quality of the workplace.

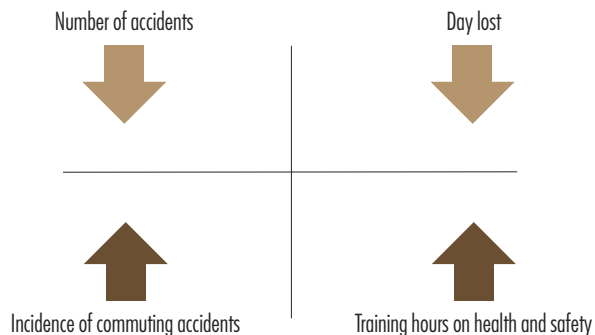
In 2013, the downward trend in **accidents** and days lost continued, as can be seen in the trend in the injury-severity index of the companies surveyed. In particular, accidents occurring in the workplace have continued to decline, whereas accidents when travelling have increased.

These results have been achieved, in part, through an intensification of efforts to increase awareness and to train employees on risk prevention and protection in the specific jobs they perform and in their specific workplace. This training also involved individuals with specific roles related to the management of emergencies and of safety generally, and the efficacy of such training was subsequently assessed.

Conversely, the average duration of injuries increased slightly compared to 2012.

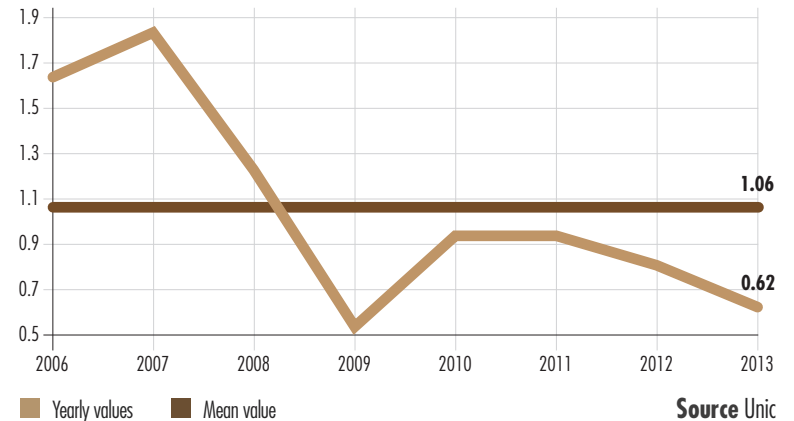
The assessment of risks is updated in response to changes in legislation or in processes, working environments and organizational structure that can have an effect on the workers' exposure to risk.

Main trends 2006-2013



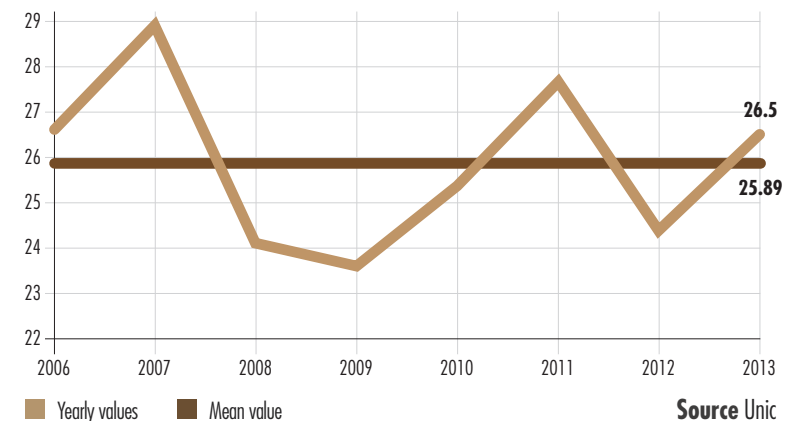
Severity ratio (lost days/number of workers) 2006-2013

The incidence of injury statistics in the tanning industry shows a decreasing trend for the third consecutive year. This demonstrates the sensitivity of the companies of the leather sector regarding the importance of risk prevention in the workplace.



Mean duration (days of absence from work/number of accidents) 2006-2013

The mean duration of accidents shows a swinging trend in the eight years of the survey. After the decrease of 2012, in fact, the indicator shows in 2013 an higher average duration of each event.



TANNING industry companies and their districts play a strategically important role in the development of the communities in which they operate.

Indeed, the evolution of their role as mere components of the economy to something of a greater social relevance can be seen in a range of initiatives aimed at promoting both the wellbeing of the community and the culture and traditions related to leather.

While paying attention to the needs of all stakeholders, the tanning industry has defined two key lines of action for the future, namely young people and communication, with the goal of promoting Italy's world-leading tanning in-

dustry and of disseminating the leather culture within the local communities. In 2013, there were three such initiatives of particular importance: the contest for junior high schools, "*Conciati nel tempo*"; the pilot project for fifth-graders, "*Le belle lettere della pelle*"; and the ballet "*Il mantello di pelle di drago*" (The dragon-skin cape).

Along with involvement in the promotional activities of a more institutional nature organized by the associations, the individual tanneries are also actively involved in financially supporting cultural initiatives and solidarity efforts by local non-profit organizations.

CONCIATI NEL TEMPO

Since 2012, UNIC, with the support of Lineapelle, has promoted a contest aimed at disseminating knowledge about leather and the tanning industry to the younger generations.

This initiative, which falls within the scope of the educational project "Amici per la pelle" established in 2010 and based on an idea by the Santa Croce group of young tanners that was then extended nationally by UNIC, targeted the junior high schools of Italy's leading tannery districts and engaged both students and teachers in the reinterpretation of objects of design from the past.

The only limit to their creativity was the use of leather in the creation of their works.

1,200 students from 12 middle schools in the three main tannery districts (4 from each district).

23 firms contributing by providing material for the 50+ works created.

12 (4 in each district) training events for the students were carried out and their teachers regarding leather, production processes and the value chain.

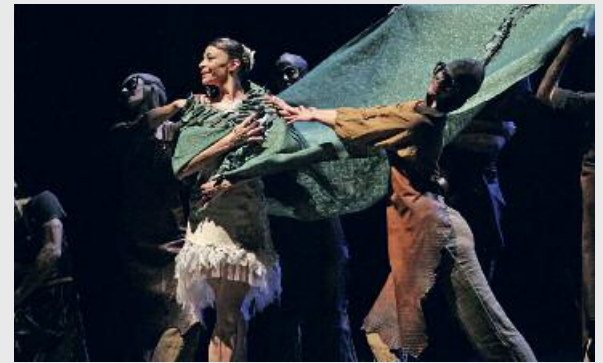
After being on display in March in the town halls of the various districts, the works were then presented in Bologna in April in a dedicated area of the Lineapelle event. The awards took place with the participation of the mayors, town councilmen and tanners.



THE CLOAK OF DRAGON LEATHER

This ballet depicted the charm of leather and featured a prologue dedicated entirely to leather working and the story of a magic tannery where dragon-skin cape was made. The ballet was based on the stories contained in the book *La magia della pelle nelle fiabe* (The magic of leather in fairytales), which was distributed to elementary schools in the leading tannery regions, reinterpreted in dance by ballerinas dressed in marvelous leather costumes.

In 2013, this important cultural and promotional event was presented at Teatro dal Verme in Milan, Teatro Comunale in Vicenza, and Teatro della Pergola in Florence to more than 2,000 spectators.



THE BEAUTIFUL LETTERS OF LEATHER

The purpose of this project was to teach fifth-graders the importance of writing through specific learning laboratories in which leather was presented as a material that has accompanied man throughout his evolution and which was used in ancient times for parchment and so played a crucial role in disseminating knowledge and culture in writing.

The project includes educational events and a visit to the Museum of Writing in San Miniato and related laboratory activities. There will also be a creative aspect in which children will be invited to write slogans using leather letters on a leather medium to help make leather the focal point of positive messages.

The project was proposed as a pilot project for the fifth-grade classes of the Santa Croce sull'Arno elementary school. Three sections, for a total of 65 students, were involved in the pilot.





Scheda di processo e controllo
 LAVORAZIONE PELLICCEZZE

BOTTIGLIE N°: _____
 TOTALE Kg: 2600

BOTTIGLIE N°: _____
 TOTALE Kg: _____

DATA: _____
 OPERAIO: _____
 D. _____
 S. _____

PROVA	RES	CONTR.	NOTE
1		C	
2		C	
3		C	
4		C	
5		C	
6		C	
7		C	
8		C	
9		C	
10		C	

*Alta fine del
 *Prima sfilata
 *Seconda sfilata
 *Terza sfilata
 *Quarta sfilata
 *Quinta sfilata

*Alta fine del
 *Prima sfilata
 *Seconda sfilata
 *Terza sfilata
 *Quarta sfilata
 *Quinta sfilata



The ethics of leather

The raw material

NEARLY all of the raw hides/skins that tanneries recover, recycle and transform (see section 1 of this report) come from the animal slaughtering for the food industry (i.e. meat).

Raw hides/skins (or semi-processed leather) are, therefore, the industry's primary raw material. Being a "byproduct" has a negative aspect as supply is entirely inelastic. In other words, the production of raw hides/skins depends, at the end of the day, on the consumption of meat.

Availability of the raw material, the cost of which accounts for 40% to 65% of the value of the finished leather, is a key factor in competing on the global leather market, and Italy's tanning industry, which imports over 90% of the raw material needed due to the limited amount of livestock present in the country, faces great challenges both in Europe and beyond.

Non-EU landscape. A number of emerging countries, which have important livestock and leather industries, gain competitive advantage by hindering (or blocking) foreign access to their raw or semi-processed material through export restrictions (e.g. duties, quotas, licensing, etc.). As a result, the local value chain benefits from controlled pricing compared to international prices and from guaranteed availability. Unfortunately, this protectionism on the raw material is rising. Whereas in 2000 24.5% of raw hides/skins globally were protected from free trade, this rate has now doubled (to 50.2%). The most significant cases concern India, Brazil, Argentina, Russia, Pakistan, Ethiopia, Nigeria and others.

EU landscape. Conversely, the European Union has never established any sort of barrier to the exporting of raw hides/skins produced within the EU, so non-EU competitors are free to acquire product from EU slaughterhouses regardless of any form of reciprocity, thereby depriving European tanneries from over half (54% in 2013) of the EU's total production of raw hides/skins. Furthermore, the raising and slaughtering of livestock in Europe is experiencing a structural decline (of 1-2 percentage points each year for over a decade) due to prevailing trends in dietary habits (i.e. lower consumption of

meat) and reduced disposable income. This results in lower levels of production of raw hides in the EU, which is only worsened by the aforementioned exports outside of the EU.

Safeguarding activities. For years, UNIC has called for the EU authorities (and the Commission first and foremost) to combat protectionism, pursue the liberalization of international leather trading, and to achieve reciprocity in treatment with non-EU protectionists, but the results that the EU has achieved have been highly unsatisfactory, and in May 2014, with the active support of the Italian Ministry for Economic Development and Italy's representation within the EU, we were even forced to take legal action

against the Commission in the General Court of the European Union for the preferential tariff rates granted to a number of the protectionist nations mentioned above.

Pressures on availability, price and quality. Each year, 355 million raw bovine hides (equal to 6.4 million tons), 532 million sheepskins (400,000 tons) and 476 million goatskins (338,000 tons) are produced around the world.¹ This general trend appears to be rising over the medium to long term; however, when we look in more detail, the leading traditional markets of hides/skins supply, which are more evolved in terms of quality and are the only ones that are free of export restrictions (in addition to Europe, also the

Extra-EU protectionism on raw materials

Export barriers

ARGENTINA		<i>Ad-valorem</i> duty 15% on raw hides/skins and wet blue leather	MOROCCO		Licensing system (<i>de-facto</i> ban) on raw hides/skins and wet blue leather
BANGLADESH		Ban on raw hides/skins and wet blue leather	NEPAL		Ban on raw hides/skins
BELARUS		Licensing system and minimum prices on raw hides/skins and wet blue leather	NIGERIA		Ban on raw hides/skins and wet blue leather
BRAZIL		<i>Ad-valorem</i> duty 9% on raw hides/skins and wet blue leather	PAKISTAN		<i>Ad-valorem</i> duty 20% on raw hides/skins and wet blue leather
CHINA		<i>Ad-valorem</i> duty 20% on raw goatskins	RUSSIA		Duty 500 €/Tons on raw hides/skins, <i>ad-valorem</i> duty 20% on wet blue leather
EGYPT		Ban on raw hides/skins	SUDAN		<i>Ad-valorem</i> duty 15% on raw hides/skins
ETHIOPIA		<i>Ad-valorem</i> duty 150% on raw hides/skins, wet blue and crust leather	THAILAND		Duty 5.000 Thb/Tons on raw hides/skins and wet blue leather
INDIA		<i>Ad-valorem</i> duty 60% on raw hides/skins, wet blue and crust leather (EI 15%)	TANZANIA		<i>Ad-valorem</i> duty 25% on raw hides/skins
INDONESIA		<i>Ad-valorem</i> duty (25%-35%) on raw hides/skins and wet blue leather	UKRAINE		<i>Ad-valorem</i> duty 30% on raw hides/skins
KAZAKHSTAN		<i>Ad-valorem</i> duty 20% on raw hides/skins (200 €/Tons minimum)	UGANDA		<i>Ad-valorem</i> duty 25% on raw hides/skins
KENYA		<i>Ad-valorem</i> duty 80% on raw hides/skins	URUGUAY		<i>Ad-valorem</i> duty 5% on raw hides/skins

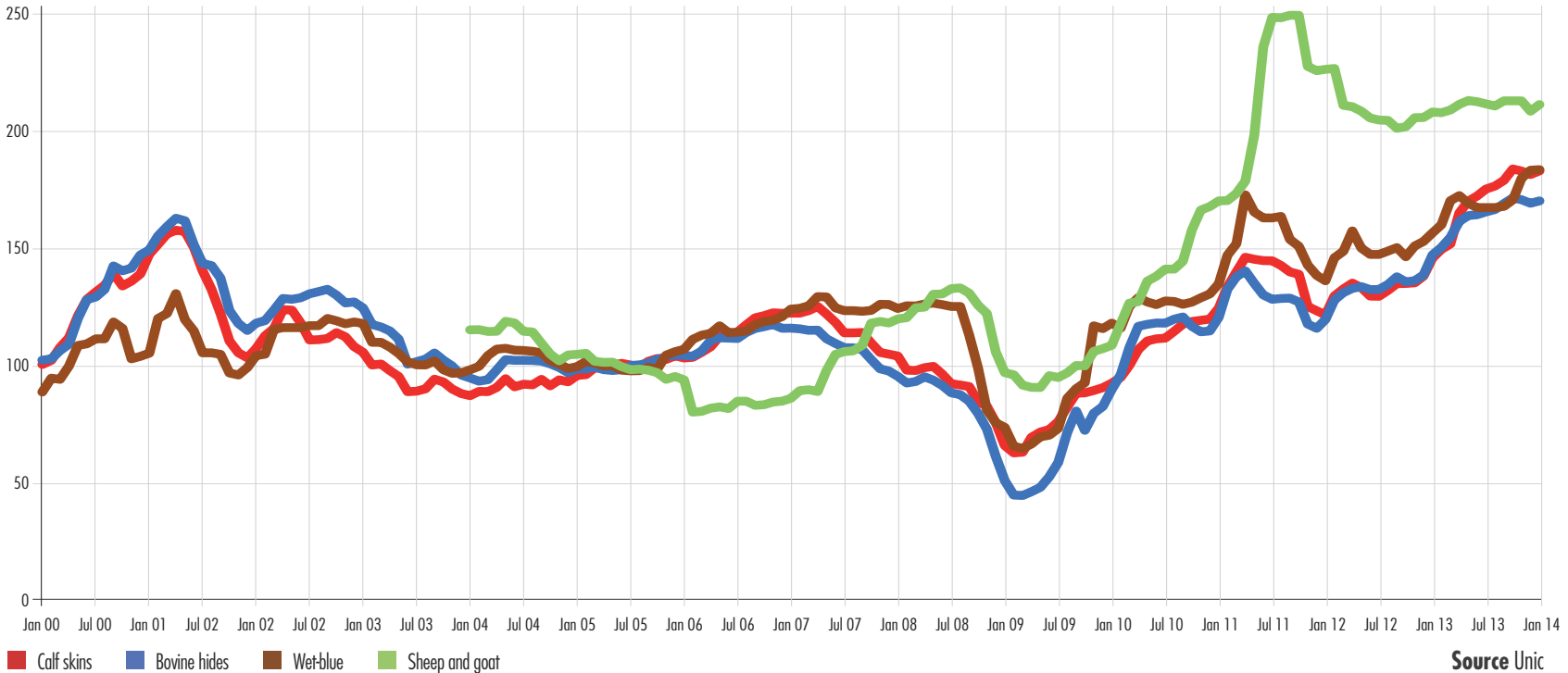
Source Unic

nations of North America and Oceania), have remained stable or have posted declines for the reasons described above in relation to the EU. This limited availability from traditional, medium to high-end sources, together with distortions in international trade caused by protectionist countries, is provoking great pricing pressure on the prices of raw hides/skins and semi-processed leather around the world. Since the crisis of 2009, prices have risen nearly constantly over the last 5 years to reach all-time highs (see chart). Finally, there is a problem related to the recent generalized worsening in the quality of this raw material, which is cause for great tension between tanneries and the slaughterhouses/dealers that provide the hides/skins. Depending on

the area, the causes are the increase in the intermingling of hides of different origin (resulting mainly from the growing movement of livestock due to the concentration of farming and slaughtering activities), the worsening of farming conditions (less sanitary and cutaneous treatments) and slaughtering conditions (limited job training), and the deliberate intermingling by dealers. The Italian tanning industry, a representative of which (R. Mastrotto) has been the chairman of the International Council of Tanners (ICT) since 2014, maintains an open, lively dialog with international raw-material suppliers through (biannual) multilateral roundtables, the ongoing exchange of information and the definition of common purchasing rules.

¹ Source: FAO

Trend of raw material prices
2000-2014



Source Unic

Traceability of raw hides and skins

TRACEABILITY of raw hides and skins is a topic of growing importance for our industry and is a methodological complement to the gathering of reliable information on certain aspects of sustainability for the industry.

Operationally speaking, it is not as easy as it might seem, for both technical and commercial reasons related to the structure and other characteristics of the value chain and of the specific roles of the various industry players. Nonetheless, given the nature of the primary needs of customers, consumers and society as a whole, there are often solutions that are able to meet these needs.

Firstly, there are no national or international laws establishing the obligation to maintain a system of tracking raw hides/skins able to identify the slaughterhouse, farm or animal of origin for each individual hide/skin upon arrival at the tannery.

Meat, on the other hand, is legally required to be traced for both health and business reasons throughout the value chain in many nations (e.g. EU, US, Canada, Australia, Brazil, Argentina...), although single procedures may vary. Hides do not have the same obligations as meat in terms of health and safety, but partial, limited tracking already exists for raw hides/skins used by Italian tanners.

However, it is first necessary to establish the boundaries of the objective by way of the following questions:

- 1 How is it to be tracked (and where): document-management system or physical media (labeling, etc.)?
- 2 What is to be tracked: individual hides or batches?
- 3 How far upstream must we go: to the individual animal, to the farm, to the slaughterhouse facility (or country of origin)?
- 4 Which origins are to be tracked: EU, non-EU, or both?

The existing traceability of raw hides/skins processed by Italian tanneries involves the EU certificates that must accompany the transport of product batches and which identify the country and slaughterhouse of origin, both within Europe and – thanks to the Traces system – outside of the EU.

Any desire to obtain more detailed information runs up against the technical problem that there is currently no single, tested method that makes it possible to identify the individual hide/skin, to prevent tampering, and to ensure that no damage is done to the hide as a result of the tracking mechanism.

At the same time, there are major obstacles of commercial nature to gathering more information upstream: (a) slaughterhouse indifference in that as there is no legal obligation nor particular financial benefit to providing, also on the hides, the information that they already have on farms and individual animals (for meat-tracking purposes); (b) the recent high levels of transportation of livestock (see section on Raw Material); (c) the significant influence of the dealers; and (d) the industrial nature of the semi-processed products.

Animal welfare

IN THE PRESENT CONTEXT, animal welfare implies a system of assessing both the quality of the livestock farming and transport condition in terms of animal wellbeing and the conditions found for the slaughtering process in terms of minimizing the animals' suffering.

Given that nearly all of the production by Italian tanneries involves bovine hides, calf, sheep or goat skins, these aspects concern the meat industry, which is, however, the only active, responsible party in this matter. As users of a byproduct of the meat industry, tanneries have no authority or economic "suasion" to intervene in the related rules and practices.

Regulations in this regard are widespread. Multilaterally, the international organizations involved are: the FAO (a UN agency, 191 member nations), which is involved in research and in the collection and sharing of information on animal welfare laws, regulations and practice, and the OIE (the World Organization for Animal Health, 178 member nations), the leading organization for this issue and which has set specific standards for animal transport and slaughtering.

The adoption of laws, protocols, codes of conduct and other guidelines governing the conditions of farming, transport and slaughtering is common practice in many countries, including EU (see. Dir. 93/119, Reg. 1099/09...), Australia, New Zealand, US, Switzerland, Brazil, India and China.

Apart from regulations concerning health and hygiene aspects, which seek to protect the consumer, the most common requirements concern the following aspects:

- In farming: medical controls and logs; adequate space for livestock; adequate light and air; sufficient, healthy feed; methods that eliminate suffering and injury.
- In transport: animal spacing and maximum numbers; vehicle temperatures; proper ramps; prohibitions to the use of prods and beating.
- In slaughtering: the prevention of shock, injury, falls or other mistreatment.

Regulations concerning animal welfare have an impact on leather in terms of both greater costs (ethically acceptable methods are often more expensive) to be transmitted downstream and hide/skin quality, which is generally improved (less damages to the hides due to injuries, etc.), but not in all cases (certain new systems for stunning the animal before putting it down can damage the hide/skin).

Raw material supplyings to Italian tanneries, nearly 95% of which comes from abroad, mainly concerns industrial semi-processed leather that may be transformed and distributed anywhere. Some 40% is in the form of raw

hides/skins, for which it is possible to state that:

- 96% of the purchases by Italian tanneries originate from countries that have animal welfare laws and regulations concerning farming, transport and slaughtering (3% comes from Muslim nations, so there is a lack of information concerning any laws, but here slaughtering - halal - is done

- in accordance with religious rituals that govern both hygiene and ethics; the remaining 1% comes from rural nations for which the laws and regulations are unknown);
- 87% comes from within the EU and so is subject to some of the world's most efficient legislation and controls.

MANIFESTO FOR ANIMAL WELFARE

THE ITALIAN TANNING INDUSTRY SUPPORTS

A Healthy and controlled **BREEDING CONDITIONS**, such as to avoid or minimize suffering, pain or injury to the animals. Buildings must be kept clean, and under proper conditions of temperature, air humidity and circulation, noise and light. All animals, even if tethered or confined, must be given the appropriate space for movement, without risk of injury or fall. All animals must be fed a wholesome diet suitable for the species, at opportune intervals and in sufficient quantity. Cruelty, violence or unjustified abuse to animals must be avoided. All animals must dispose of proper care in case of injury or disease.

B **SAFE CONDITIONS** during transfer/transport. Sufficient floor area and height in the means of transport is provided to animals. Water, feed and rest are guaranteed to the animals, appropriate to the species and the intended journey. Journey must be carried out as rapidly as possible and without unjustified delay. Unloading procedures must minimize the risk of injury, slipping or stroke among animals; the transfer to assembly centers must guarantee the same conditions.

C **KILLING CONDITIONS** such as to minimize pain and distress. Animals must receive comfort by being kept clean, properly fed and by being prevented from injury and distress. Killing must be carried out exclusively after the restraint and stunning (except for particular methods prescribed by religious rites), which shall be maintained until the death of the animal. Restraint and stunning procedures must minimize suffering and ensure compliance with current legislation.



Transparency and country of origin

AS THE MARKETPLACE gradually changes with the increasing emphasis by both businesses and consumers on the issue of sustainability, a new concept of quality is coming to the fore which has to do, not only with the actual characteristics of the product itself, but also with transparency and the disclosure of a number of social, safety and environmental requirements related to the entire production process found in a given country.

In fact, a study conducted within Europe has shown that a majority of consumers choose products based on the country of origin, while a smaller, although still significant number are willing to pay a higher price for products coming from a specific area. This is certainly reasonable given the internationally recognized value of the products of certain nations, such as the leather produced in Italy.

Manufacturers today are highly complex organizations, and while in the past certain products most certainly had a more “local” character, now the opening of the marketplace has led to a great deal of delocalization. As such, it can be much more difficult now to determine how and, more importantly, where a consumer good is actually made.

For this reason, and in order to convey an image of manufacturing excellence through specification of the country of origin, the Italian tannery industry believes strongly in the idea of true transparency in the consumer goods market.

This means identifying and disclosing both where the product (whether it be a bag, a shoe, or an article of clothing) was made, i.e. where the last substantial transformation took place, and also where its component materials came from.

Clearly, in certain types of products, such as a handbag, a shoe or even a piece of clothing, the materials used play a crucial role in giving value to the product, whether in terms of look, style, quality or cost, and it is also true that the consumer cannot always be aware of the complexity of the production process underlying the products being purchased. The consequence, then, is a lack of certain key information that could have an impact on the buying decision.

As such, consumers have a right to obtain this information in order to make informed choices. This can only happen if clear information is provided concerning the origin of both the production of the consumer good and the leather used in its production, such as in the case of the marks “*vera pelle*” (genuine leather) or “*vero cuoio*” (genuine cowhide), which ensure both the authenticity of the material and also, given that they are written in Italian, the Italian origin of the product in question.

Leather product safety and consumer protection

IN ORDER to ensure both consumer safety and the highest quality of leather products, Italian tanneries conduct daily controls through the management of production processes and the selection of suppliers, in addition to controls regarding the raw material in order to ensure both that performance meets the requirements and that chemical use complies with the strict EU standards.

With regard to restricted substances (in terms of use and/or presence) in particular, Italian tanneries comply with the obligations set for articles producers by using chemicals and raw materials that comply with related laws and regulations and by ensuring the proper communication throughout the supply chain.

The proper management of these aspects is also supported by controls regarding the leather, in relation to the type of article, the recipes used, and the process concerned. For some time now, the tanning industry has been taking steps to conduct the appropriate controls on leather based on the type of article and process involved, as exemplified in the UNIC specifications (see below), which are used by tanneries in the handling of restricted substances.

Given that the methods used to chemical analyses of leather and capability of the labs that conduct the analyses are an important, if delicate, aspect in proper communication throughout the supply chain, in 2013 UNIC, which has, for years now, worked to define and standardize testing methods and technical specifications applicable to leather as per CEN, organized a network of laboratories that, through periodic ring tests, can assess their own performance as concerns leather (see below).

The controls conducted by Italy’s Guardia di Finanza and customs authorities to protect UNIC trademarks also contribute to safeguarding European consumers by verifying and blocking consumer goods coming from outside Europe that contain high concentrations of hazardous substances or that are otherwise potentially dangerous.

Some substances should be kept under control more than others, either because they can generate during processing (e.g. formaldehyde) or because their concentrations change during application (e.g. heavy metals and phthalates used in leather finishing).

In order to enhance the controls of the chemicals used, specifications guide are being prepared with the help of the chemical suppliers.

ANALYSIS METHODS AND RELIABILITY

Network of laboratories

The reliability and repeatability of leather analyses depend a great deal on both the method used and the experience of the labs conducting analyses on the leather. Indeed, analysis errors are often encountered when the analyses are conducted using non-specific or standard methods or inadequate experience of the labs.

There are currently 81 CEN-standard methods for leather (UNIC is in charge of the Secretariat for the CEN leather sector), which concern physical and chemical tests, color-fastness tests, and other technical specifications. These methods, having been developed specifically for leather, often have detection limits that are different from tests referred to other materials (such as fabrics).

The skill and experience of the testing laboratories is also a critical factor. For this reason, in 2013 UNIC organized a network of laboratories that, through periodic ring testing, can verify the reliability and repeatability of the results on a number of key parameters, in accordance with the requirements of certifying bodies.



SPECIFICATION

Leather and chemical substances



In order to support tanneries in handling obligations regarding leather and chemical substances and the requirements of customers, which are often inapplicable and irrelevant, UNIC has prepared an easy-access document that is updated at least every 6 months in response to the ECHA publishing new SVHCs and which lists:

- the controlled substances within Europe and internationally (in California and in the US generally, and in China, Korea, Japan, Taiwan, Vietnam, etc.);
- reference laws and regulations and the concentration and usage restrictions to be followed;
- the recognized testing method;
- applicability to the various types of leather (e.g. sole leather, suede, patent leather, etc.). The type of tanning and finish in particular are key factors in determining whether or not it is possible for a substance to be present in the finished leather articles.

These UNIC specifications have been approved by the leading product buyers.



Schneider
MAGETA

Clock 10:50 Clock 29/4/2014 1:39

STOP START

PARAMETRI

F1 F2 F3 F4 F5 F6 F7 F8

RICHIAMO
POSIZIONE

AVANTI

INDIETRO

INDIETRO

ARRESTO DI
EMERGENZA

The certifications

Introduction

THE SUSTAINABILITY of production processes is now a key factor in a company's competitiveness, so mechanisms such as independent certification by qualified bodies that provide an objective assessment of a company's performance are becoming increasingly important.

The certification of sustainability is a complicated process. In fact, the sustainability relate to a range of fields (such as environmental, financial and social aspects) and apply to many different levels (e.g. product, process, site, supply chain, etc.).

For some time now, the tanning sector has pursued certification as a means of supporting the value and commitment that tanneries ensure at the level of both the product and the system as a whole.

Since 1994, ICEC, a certifying body that has been accredited by Accredia, has worked to certify firms in the tanning industry based on the leading national and international standards, to which a number of technical specifications concerning aspects for which the market requires guarantees or which further support businesses in properly promoting high-quality products have been added.



The environmental certification

WITHIN the broader concept of sustainability, the environment plays a central role in the current market context.

One of a certified company's key objectives is to ensure its products and processes are more environmentally compatible in terms of efficiency and quality by making a conscious decision to protect the environment.

Environmental certifications based on recognized standards document a production process and its environmental compatibility and so are an important, official recognition of a company's performance in terms of its commitment to the environment when issued by a qualified body.

There are certifications of product or system based on whether the certifi-

cation concerns the environmental management of the production process (ISO 14001), the environmental declarations of a management system or product (EMAS, EPD, environmental claims), or the environmental parameters used to award the mark of ecological quality of the leather (*Eco-Leather*). An important development for the future will be certification based on a product's entire life cycle, of which the EPD is one of the first examples. This will allow for broader assessments of environmental impact that will not be limited to a given production facility, such as assessments of environmental footprints (the carbon footprint and water footprint based on the new ISO standards).



Certification
UNI EN ISO14001

“Environmental Management Systems”

ICEC Accreditation
Accredia nr. 019 D

The certified company's management system is adequate for keeping the environmental impact of its activities under control and is systematically improved in a consistent, efficient and sustainable way.



Validation
EMAS REG. 1221/2009

“Eco-management and auditing system”

ICEC Accreditation
Ecolabel-Ecoaudit
Commission nr. IT-V-0016

EMAS is mainly focused on improving the environment and offering to the market, control authorities and citizens a useful tool to be informed about a company's environmental performance, i.e. the Environmental Declaration



Product Certification
UNI 11427

“Definition of the performance characteristics of leather with a low environmental impact”

ICEC Accreditation under preparation with Accredia

The environmental criteria and functional characteristic of eco-friendly leather are being standardized at a national level. In particular, this standard fixes the minimum requirements to be met to obtain the eco-leather logo.



Validation
“Environmental Product declaration”

ICEC Accreditation
Accredia nr. 005 H

Based on the enforcement of the Product Category Rules (PCR) governing bovine leather, this document helps companies issue their product environmental declarations in compliance with ISO 14025 standard, and with a Life Cycle Assessment approach in accordance with ISO 14040 standard.



Certification
UNI EN ISO 14021

“Environmental claims”

The environmental improvement being claimed may be the result of a new production process, the installation of new technology, the use of different raw materials, or other aspects implemented by the company. One necessary condition is that it be an actual improvement measured when the ICEC validates the claim.

Financial and product certification

FOR TANNERIES, there are a variety of certification services aimed at promoting greater financial and commercial transparency in a company's activities.

Starting from by the traditional ISO 9001 for the company's management system of organization, the leather industry has developed more specific certifications to promote the technical performance of products and processes, including in terms of how they safeguard the health and safety of the consumer.



Certification UNI EN ISO 9001 **"Quality management systems"** **ICEC Accreditation Accredia nr. 034A**

Certification of a Quality Management System, which guarantees compliance with product-related requirements, is a valid tool both in ongoing product improvement and in providing quality services to the customer. Over time, costs and risk factors have declined drastically through the proper organization of operations and of production processes.



Certification Product certification by destination sector **"footwear, leather goods, furnishings, clothing, car interiors"** **ICEC Accreditation Accredia nr. 034B**

Certification is granted based on compliance with specific international standards for the leather industry or on the technical specifications of the party requiring certification and provides customers with information concerning a product's performance. It includes an assessment of the company's system of quality assurance and the primary standards regarding the safeguarding of consumer health and safety. Testing is conducted at accredited or otherwise qualified laboratories.



Certification ICEC **Technical Specifications TS 408** **"Financial management system"**

The importance for a company to have an efficient financial management system lies in being able to actively monitor operations and not just passively suffer the consequences. It is a valid means of establishing a relationship of trust (with customers and banks).



Certification UNI 11239 "Made in Italy" **Made in "Certification of the leather production origin"** **ICEC Accreditation Accredia nr. 34 B**

Product standard that indicates the country where leather is produced, according to international customs regulations. In order to be recognized Italian origin, finished leather must have undergone in Italy at least retanning, fatliquoring and dyeing processes. If instead all the processes have been carried out in the same country, a "100% made in" can be issued.



Certification ICEC **Technical Specifications TS SC410 / TS SC412** **"Tracking of raw materials (hides&skins)"**

This point to the level of control that tanneries have over their suppliers, including knowledge of the countries of origin of the raw hides and skins and of the slaughterhouses and farms involved. To this end, reliable, mathematical ratings and brief assessments express the level of control over what a tannery purchases in terms of the traceability of the stages required to produce the raw material.



Certification ICEC Technical Specifications TS 406 **"Certification of laboratories for leather testing"**

This approach was created for the validation of laboratories that work with leather by controlling the management of all aspects in line with the principles of quality and of the specific ISO 17025 standard, such as personnel training, the test environment, instrument management, and the preparation of test reports. These aspects are verified periodically in order to ensure the utmost reliability of the test conducted on leather, including physical, chemical and fastness tests.

SOCIAL CERTIFICATIONS complete the overview of sustainability certifications. The UNIC code of conduct and social responsibility is a tool that has been developed by the leather sector in order to pursue the proper management of issues related to corporate social responsibility and to disclose the guiding principles and performance levels to all stakeholders.

The 2013 code, which was shared by the trade unions when renewing the collective bargaining agreement, is based on the main international conventions regarding workers' rights (ILO) and the main voluntary standards of social responsibility (SA 8000, ISO 26000), including the fundamental requirements in terms of the environment, business ethics and consumer

protection as applied to the tanning sector.

The adoption of the UNIC code of conduct and social responsibility gives tanneries the opportunity to establish in-house agreements that take full advantage of their workers' efficiency and engagement.

As specifically concerns health and safety in the workplace, the international standard OHSAS 18001 ensures the proper management of occupational risks and the constant improvement of health and safety conditions.

Aspects concerning consumer health and safety are covered by REACh certification as described in the related UNIC specifications document (see section 4).



**Certification
Code of Conduct
and Social Accountability
UNIC**

The Code represents an essential tool to make the principles driving the company be known. The document officially identifies the values of conduct and social responsibility adopted by the company. The document is based on the principles of ISO 26.000, SA 8000, the most important international agreements (ILO) concerning the protection of workers' rights, as well as commercial ethics and social and environmental responsibility. The present Code has been approved by the unions.



**Certification
OHSAS 18001**

**“Health and Safety
at Work Management
Systems”**

**Accreditation under
preparation with Accredia**

The implementation of a H&S at Work Management System helps companies identify and keep under control all risks related to health and safety in the workplace, reduce the number of possible accidents, be compliant with the legislation in force, and constantly improve corporate performances. It also translates into allowances from INAIL (Italian Institute for Insurance against Work Accidents).



**Certification ICEC
Technical Specifications TS 416**

**“REACH management
as per UNIC specifications”**

Operational needs and UNIC specifications provide information to companies wanting to obtain certification which concerns the restricted substances and the national limits of the leading destination markets, testing methods, and control procedures based on the type of leather article and the raw material used.

SUSTAINABILITY ATTESTATION

The leather industry has evolved as concerns the sustainability issues and, with the various, specific certifications available, is able to demonstrate and disclose its performance in terms of compliance and sustainability, ICEC has developed another instrument of promoting the excellence of particularly virtuous companies through a specific recognition in the form of a “sustainability declaration” which is both validated and certified.



Appendix

Code of Conduct and Social Responsibility



THE COMPANY that voluntarily complies with the code of conduct and social accountability UNIC must ensure compliance with the relevant legislation in force, including the National Collective Bargaining Agreement of the tanning sector and with the requirements contained in the present document, drawn from the most important international agreements and standards concerning “social responsibility” and applied to the manufacturers and service providers of the leather sector.

The present Code is approved by the following trade unions: FILCTEM-CGIL, FEMCA-CISL, UILTEC-UIL. In order to verify that the requirements needed to obtain declarations of compliance with UNIC’s Code of conduct and social responsibility are met and maintained, companies are regularly inspected by a qualified third party (ICEC) charged by UNIC thereof. Further controls are also possible to check that a company’s suppliers/contractors meet the provisions prescribed for them.

For the correct interpretation of the requirements of the code refer to the document “Guidelines for the adoption and implementation of the UNIC’s Code of conduct and social accountability”.

HUMAN RIGHT AND WORKING CONDITIONS

CHILD LABOUR

1.1 The company must not use or support the use of infantile labour.

1.2 The company has in particular to protect employable minors from any conditions that may be dangerous, hazardous or harmful for their health and safety in the workplace, in compliance with the prescriptions of the legislation in force.

FORCED LABOUR

2. The company shall not use or support the use of forced labour, nor ask their staff to deposit any money or original identity documents for conducting of the employment relationship.

DISCRIMINATION

3. The company shall not discriminate upon hiring, remuneration, access to training, advancement, layoff or retirement based on sex, race, national origin, disa-

bility, religion, social status, sexual preference, union membership, political affiliation, age and any discriminatory condition.

LABOUR UNION AND BARGAINING

4. The company shall respect the right of all workers to join the union of their own choice and to participate to collective bargaining.

HEALTH AND SAFETY ON THE WORKPLACE

5.1 The company shall provide a safe and healthy workplace and will adopt appropriate measures to prevent and manage work accidents and damage to health during the performance of a job or resulting there from.

5.2 The company shall appoint a managers' representative to implement all issues guaranteeing health and safety in the workplace.

5.3 The company shall ensure that the staff receives an effective training about health and safety at work. Such training is regular, documented and repeated for any new or reassigned staff.

WORKING HOURS

6. The company shall comply with the laws and all dispositions currently in force contained in the National Collective Labour Agreement regarding the working hours for the workers of the tanning industry and related sectors. The mean weekly hours, calculated over a reference 12-month period, shall not exceed 48 effective working hours. The staff will be guaranteed at least 24 consecutive hours' rest every 7 days.

REMUNERATION

7.1 The company shall guarantee that remuneration always corresponds to the standards fixed by the law and to the minimum parameters fixed in the National Collective Labour Agreement for the workers of the tanning industry and related sectors.

7.2 The company shall guarantee that the composition of remuneration and of allowances is clearly and regularly specified.

HUMAN RESOURCES ENHANCEMENT

8. The company shall promote the enhancement of human resources through skills development, corporate culture and employability, including through continuing training initiatives.

ENVIRONMENTAL

9. The company shall fix and maintain procedures and practices aimed at reducing the environmental impact of its activities.

INVOLVEMENT AND DEVELOPMENT OF THE COMMUNITY

10. The company needs to promote community development through dialogue

and collaboration with stakeholders, also through representative associations to which he subscribes.

PROFESSIONAL BEHAVIOUR

11.1 The company shall respect the principles of transparency, fairness and good faith in its relationships with the institutions, customers, suppliers, and competitors, and avoid any unfair competitive actions likely to cause damage and violate the principles of the present code.

11.2 The company shall guarantee product quality and consumers' protection.

POLICY AND MANAGEMENT

12.1 The management must formalize a corporate policy for social responsibility so as to guarantee:

- a) the commitment to comply with the principles of the code, to maintain compliance with legislation in force and to comply with the agreements signed;
- b) the commitment to continual improvement, in particular with reference to the organizational system;
- c) to be easily accessed and understood by all employees, including directors and management;
- d) to be available to all stakeholders.

12.2 The company shall appoint a representative of management to ensure, independently from other responsibilities, the compliance with all requirements of the present document.

12.3 The company shall ensure that workers choose their representative to facilitate relations with the administration regarding matters of this document.

12.4 The company shall establish and maintain appropriate procedures to assess and select suppliers and contractors based on their capacity to meet the requirements of the present document and give documented evidence thereof.

12.5 The companies must establish and periodically review corporate objectives in relation to the provisions of this Code and to provide procedures for communicating the performances to all stakeholders.

12.6 The companies must ensure that all the requirements of the Code internally are understood and effectively implemented

12.7 In the case of non-compliance or pending disputes on the issues covered in this document and for their resolution the company must prove by objective evidence their adequate management through corrective actions. The company must also develop preventive actions to avoid their recurrence.

12.8 The company will keep a suitable documentation certifying compliance to the requirements of the present document.

With the collaboration of

COMPANIES

AMBASSADOR S.P.A.
ANTIBA S.P.A.
BCN CONCIERIE S.P.A.
BONAUDO S.P.A.
CAMALEONTE S.P.A.
CARISMA S.P.A.
CONCIERIA INCAS S.P.A.
CONCIERIA MONTEBELLO S.P.A.
CONCIERIA SETTEBELLO S.P.A.
DANI S.P.A.
DEAN S.P.A – INDUSTRIA CONCIARIA PELLI
DMD SOLOFRA S.P.A.
FLLI GUARINO DI DONATO S.P.A.
GRUPPO MASTROTTO S.P.A.
LA TIMOR S.R.L.
LUFRA S.R.L.
N.C.L. S.R.L.
RINO MASTROTTO GROUP S.P.A. - BASMAR
RINO MASTROTTO GROUP S.P.A. - POMARI
RINO MASTROTTO GROUP S.P.A. - CALBE / AREA FASHION
SCIARADA INDUSTRIA CONCIARIA S.P.A.
VIGNOLA NOBILE S.P.A.
RUSSO DI CASANDRINO S.P.A.

WASTE WATER TREATMENT PLANTS

COGEI SRL
CONSORZIO CUOIO-DEPUR S.P.A.
MEDIO CHIAMPO S.P.A.
ACQUE DEL CHIAMPO SPA
CONSORZIO AQUARNO SPA

SPECIAL THANKS TO

STUDIO BINI-SPALLETTI SRL

PUBLISHED BY

La Conceria srl

PRINTED

September 2014

PHOTOGRAPHIC CONTRIBUTION

Special thanks to
Ausonia Srl, Bonaudo SpA, Cristina SpA, Incas SpA



UNIC

Via Brisa, 3 - 20123 Milano

Ph. +39 02 8807711 Fax +39 02 72000072

ambiente@unic.it

www.unic.it

