

Country Commentary: Italy



The picturesque walls of Marostica in the Arzignano area may have provided political and commercial protection in the 1800s but today are no barrier to the flood of external competition sweeping across Italy's leather sector.

Deep-seated concerns for the future

Anyone reading Market Intelligence in our sister electronic publication *World Leather Business Week* will know that the leather industry is not a happy place right now. The clothing industry is suffering badly, the upholstery industry is not happy, even the automotive sector is not that strong, and the positive aspects of the footwear industry at retail do not appear to be moving easily through to the tanneries.

And, of course, there is China. Despite a decade of preparation, textile manufacturers in much of Europe and the US were still not fully prepared for the end of tariffs on January 1, 2005. Retailers and manufacturers are now at odds, and European countries with a manufacturing base are battling with those who have no industry left on how to deal with the situation. Shoemakers have felt this wind of change and footwear imports from China into Italy have soared to such an extent that Italian shoemakers made a symbolic journey to Brussels early in the summer to hand in their keys.

Coincidentally the Bologna trade shows in October, which combine Lineapelle and TanningTech, will be missing the top five chemical companies for the first time. The reasons are complex but are indicative of an underlying worldwide industrial concern about the role of trade shows within the marketing communications mix. Yet with volumes of leather made in Europe in general, and in Italy in particular, in

decline and with the EU's REACH initiative likely to reduce this further, the globally well-placed chemical companies might just have chosen to transfer marketing resources away from Europe to focus elsewhere—on China, Russia, India and Brazil, for example.

Not that this necessarily threatens the trade fairs too much as, even with reductions, the innovative Italian industry will remain interesting to the smaller specialist chemical companies that exist in Europe, and the increasing number of new concepts coming from Italian machinery makers is a must-see for global tanners.

Santa Croce suffering

As we look around the tanning industry in Italy life has been uncomfortable for

some time. Solofra has been struggling for a long period and only looks as though it is going to get worse and Santa Croce sull'Arno has seen some incredible lows after its global supremacy of the 1970s and 80s. News came in of some slight improvement in 2005 related to increased production of footwear leather but, as *World Leather* dug deeper, the first reply we heard was, "better I avoid any comments otherwise your article should sound like a funeral concert...."

This situation is particularly worrying when you consider the relevance of Santa Croce sull'Arno in terms of Italy's leather industry. The area, which covers only 300 km², houses 1,800 small- and medium-sized leather companies, employing some 16,000 of the 21,000 people employed in the leather processing industry in Italy and accounting for 35% of the whole country's leather production. It also produces 98% of the national production and 70% of the European production of leather soles. Being a hub of leather production, other companies such as chemical companies, and garment and leather goods manufacturers, were attracted to the region and the 90,000 inhabitants are almost solely dependent on leather for their livelihoods.

The threat posed by new developing markets could have a dramatic impact on this region. In an effort to save the industry—and the local economy—the area has taken a number of steps to protect its ►

Italian exports by industry of specialisation (2004)

	% weight	% change
Food and beverages	5.5	4.2
Textiles, clothing, shoes and accessories	15.8	-1.1
Household appliances, furniture and building materials	13.6	4.5
Mechanics	17.9	8.3
Made in Italy	52.8	4.0
Total	100.0	6.1

Source: ICE calculations on Istat data



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leather industry. There has been significant organisational restructuring in the industry, which has little to do with the private ownership of firms and a great deal to do with creating economies of scale in order to fend off competition and survive. Groups and collaborations have been established in specialised areas such as chemicals and raw materials, and firms are now working together to optimise marketing strategies, research, and logistics. The area is also exploiting its reputation for quality and technology to ensure its market share in the higher end segment.

Arzignano doing better

Over the last few years the leather triangle centered on Arzignano, which covers 600 Km² in Vicenza province and is defined by the routes of the rivers Chiampo and Agno, has been doing much better.

If you book yourself into the Hotel Pieve in Chiampo, you still know there is a leather industry in Italy. All around the hotel you are surrounded by working tanneries and in the bar you will almost certainly meet chemical suppliers and leather buyers. Like the centre of the leather universe you will find tanners from China, from Brazil and from Vietnam and all around the world. You will find customers making use of the chemical companies' laboratories to work upholstery leather, where Arzignano is expert and suppliers like Lanxess have made Arzignano a skill centre. You will find technicians and managers from the top tanneries in the world slipping in and out on visits to the machinery makers, trying to ensure that they have access to the newest ideas before the competition.

The firms have generally greater scale than those in the other region, and better analysed international contacts. What is more, they have been working a great

deal in the upholstery and automobile sectors that have been very strong and less subject to the attacks from low cost tanners. But now the upholstery sector has taken a serious dive—a look at the recent figures for Natuzzi, the giant furniture manufacturer, is indicative. The company reported net losses of €8.4 million for the second quarter of 2005 versus net earnings of €12.7 million reported in second quarter 2004. A new restructuring plan focusing on reducing manufacturing costs in Italy was introduced. This includes a temporary work force reduction of 1,320 workers by the end of 2005. While not singling out Natuzzi in any way, industry analysts have argued for some time that in the furniture sector consumers have been confused by low cost deals for very poor quality leather and that this would inevitably lead to tears. Now some Arzignano tanners are trying to get back into making footwear leather.

The demands of an international perspective

Most of all, a look at the Italian leather industry today involves taking an international view. The exciting local area network or cluster concept has been clearly shown as a failure in the fight against globalisation if the cluster does not have strongly exploited international links. According to Anthony Clothier even this is now under threat.

As a powerful tanning nation with limited raw material supplies there were always quite good relations to bring in raw materials, and many of these extended into overseas technical support deals. This has given the foundation for some movement of Italian tanning overseas, although it has been sporadic. In general it is the tanners in the north who have moved with greatest effect and the chosen destinations have had

different objectives than just raw material supply.

Two important destinations are Brazil and the countries of the former Eastern European bloc. The latter are favoured by the north of Italy purely as the result of geography. Managers can travel there to control plants but still get home to Italy regularly, and it is the sort of location where certain parts of production can be economically balanced with continued higher value processing in Italy. For the tanners involved in this activity value stream analysis has been the exercise of the last few years, and well done it should pay off for them.

Developments in the countries of the former Yugoslavia and in Romania are typical. There is a long tanning tradition in these areas with places like Hunedoara in the Cerna valley mentioned since the 12th century as a hub for leather tanning, wool processing and clothing industry. Other European companies are seeing this area, extending to Slovakia, Hungary and Albania as a suitable region to obtain footwear and garments so Italian tanneries there can contribute to top line expansion as well as bottom line improvement. As a direct result of the large number of Italian companies that have successfully invested in Albania, Italian footwear and leather production companies were the first to be invited to participate in two recent programmes to assist growth in key industrial sectors in Albania. The reason for the success of Italian companies in their cooperation and relocation in Albania is attributed to the proximity of the two countries, and the resulting ease in transporting goods and moving personnel between the two.

A number of Italian tanners have also looked at Brazil and started production there. One of the most ambitious, which was been completed in no more than nine months, was the construction in the Ceara state of a Mastrotto plant. It is designed for the production of finished leather for upholstered furniture, car interiors and footwear and is a joint venture with the Brazilian Bertin group, which specialises in the meat sector—and is said to be the leading national exporter—and in the production of wet-blue tanned leather.

Another joint venture, Belazini Indústria e Comércio de Couros in Brazil, has also been established between Italian tannery Zini and the Brazilian tannery Belafranca. The companies openly stated that the main objective of the new company is to bring together Italian technology with Brazilian production competitiveness. The ➤

Tannery production

	2004		% change 2004/03	
	million sq ft	million €	Quantity	Value
Bovine	122.451	3.402	-0.6	-4.9
Calf	10.780	433	2.0	-3.7
Sheepskin	17.561	428	-5.4	-13.0
Goatskin	14.460	402	-2.2	-3.8
Other skins	523	68	-1.3	-1.4
Total	165.774	4.732	-1.2	-5.4
Sole leather (tonn)	41.311	282	-11.8	-16.8
Total	-	5.014	-	-6.2

Source: UNIC

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company, which saw an initial investment of €2 million, began operations in January 2005.

According to Alberto Magaglio, commercial director of Belazini, 70% of the company's production will be exported, 20% will be sold in the state of São Paulo and 10% in Rio Grande do Sul. The new facility is expected to produce 100,000 metres of leather per month by the end of 2006, although the plant has a monthly production capacity of 200,000 metres.

India—possibly attractive to both tanners and machine builders

Recent moves by India to build free trade zones—two in Chennai and one each in Nellore, Agra and Kolkata—designed for tanners and footwear producers have had some success in pitching at Italian companies to invest. The major zone in Nellore is exclusively for tanners and there are high hopes that more Italians will invest. And following the announcement that Indo-Italian trade is likely to cross the \$5 billion mark this year, made after Indian Union Minister of Commerce & Industry Shri Kamal Nath's visit recent to Rome, there is every opportunity for Italian companies to expand their trade with India. If other sectors can take advantage of the prospects offered by India's development, there is no reason why Italian machinery producers should not. This is especially poignant in light of the fact that the Indian leather industry is expanding quickly and exports are set to beat the targets set for the year and are estimated to be worth \$5.2 billion by 2010.

However, India has not been good territory for the Italian machinery makers, and is viewed more as a market for reconditioned machinery. Steadily over the last twenty years the Italian tannery machinery companies have chosen to take control of the supply of performance tanning equipment, with just a few individual companies in Spain, Germany and Switzerland completing the picture. Despite this premium positioning Assomac's AGM this June was not a happy affair. "With a sense of responsibility, Assomac made this meeting an operational moment of opportunity for allowing each associate to express his discomfort due to the crisis, his worry, as well as his expectations." Yet misery misrepresents the great achievements they have made in coming to terms with the new global realities, and much of the complaint comes down more to losses in footwear machinery exports, which remain over-dependent on the European market.



Not all gloom and doom

President Giovanni Gaia noted that "Fortunately, the tanning machine sector is going in another direction. In contrast to the shoe and leathergoods manufacturing machines, its export business has shown a 6.71% increase. While export performance was good during the first six months of the year, it had a downward trend during the second six months, a trend that continued during the first part of 2005. What makes the 6.71% increase particularly interesting is that it was made possible by the increase in the exports to China. As regards tanning machinery, Asia is by far the most interesting area. In 2004, with an increase of almost 24%, it accounted for 43.82% of our export business. Today, America accounts for 23% of our export business and Europe only 24%."

This change in focus, towards Asia, was illustrated by the large presence of Italian tanners, chemical producers, and machinery manufacturers at the recent All Leather China Exhibition (ACLE) in Shanghai in September. Assomac exhibited at the event for the first time, with a group of 27 companies from the machinery sector.

For it is the machinery makers of Italy that have been able to transfer their skills to sell not just machines but benefits to tanneries—benefits of greater yield, higher efficiency or finer grain. Certainly making basic tannery machinery has no role for the Italians, at least not in Italy. Basic tannery machinery will be made in Asia and Brazil, and as with Brazil it will even be hard for the tanners to export specialised equipment to some of these countries. Tariffs or costs will exclude them.

Quite a number of companies who have

a history of sound basic machines have decided to build subsidiary businesses or partnerships in Brazil, so they can sell their basic equipment in this large market, free of tariff concerns. Bauche, for example, has a small set up there. Erretre, which started there in 1988, have got much more serious in the last five or six years, and a new plant was built in 2004, albeit as a separate financial benefit.

As *World Leather's* machinery expert, Walter Landmann, says "the real asset is know-how, experience, and strategy—Italy must not lose this asset." Even at this moment the innovations coming from Italy are exceptional. For instance, the new Cartigliano drying and staking lines have changed the approach of tanners to productive efficiency. Linta's upside down splitter, is designed to assist in some of the issues of chrome free production, but is also finding a role in some of the less conventional uses that were found 25 years ago for the iconic Mercier. Erretre with its controlled dry drum, where not only humidity and temperature can be controlled, but also chemicals can be added, is another. Gemata and Bergi with their advanced roller coating that has revolutionised the finishing processes and Carlessi's electrical tunnel and all the work done on measuring and substance control by GER are further examples of major innovations.

The future is not in single machines

What is exceptional about nearly all these is that they are not just new machines, they are new technologies. As Neil Postman, the influential social critic and educator, said, "If you add technology to a system, you don't get the old system plus technology, you get a new system." The top Italian machinery companies recognise this and are installing experimental tanneries to be able to place their technology in context, and building relationships with chemical companies to ensure they understand the outcomes.

This will have a secondary benefit if the domestic tanners diminish in number, as much of the product development in machinery has been done in partnership with this group.

As Antonio Polato told *World Leather*, "The future is not in single machines", and the tannery machinery makers in Italy are taking a broad look at the global needs of tanners and their customers and providing solutions to problems that are obvious but, more cleverly, to some problems the tanners have not yet articulated.

The target for these companies is that ➤



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a small group of famous tannery names that span the world with a reputation for premium quality leather targeted on the world's top brands.

Nevertheless the overall feeling coming from Italy remains profoundly pessimistic. As Mr. Rossano Soldini, chairman of ANCI, (Associazione Nazionale Calzaturifici Italiani) took his keys to Brussels, he said, "For thirty years we have won the battle against globalisation from Brazil, South Korea and Taiwan. We have always been the leader without financial aid, in research and innovation, product quality and style. We are not afraid to compete against low labour costs. We are, however, helpless against those who can sell a product at the price of just the raw material because they resort to dumping on all fronts, social, environmental and currency-related."

"The picture that lurks on the horizon," continued the president of ANCI, "is the rapid dismantling of the European and Italian footwear industry, with the loss of over 12,500 companies and 320,000 employees in Europe and 103,500 jobs and 7,300 companies in Italy. We cannot even imagine the economic cost to our country in terms of growth, but even higher will be the social cost, with hundreds of companies closing their doors and thousands of workers left at home."

However, despite the overall pessimism, there have been small victories along the way. After lobbying politicians, an anti-dumping investigation has been launched against Chinese, Indian, and Vietnamese imports of all leather footwear except for sports shoes. "This result gives me particular satisfaction," stated ANCI's

Soldini, "not only because it is the first step towards adopting duties, but above all because it means the Commission implicitly recognises that there is a problem..."

Peter Mandelson, the EU's trade commissioner, may think he has found a solution for the recent "bra wars", but he has rough waters ahead with the Italian cobblers. The industry, however, must also seek ways to help itself. Despite the influx of Chinese garments, Lombardy has maintained a €7 billion garment and textile industry. Notwithstanding, the region has seen over 500 firms close in recent years and the vast majority of these were leather manufacturers. If the garment manufacturers are facing the dragon head on, is it not time that the Italian leather industry took the bull by the horns? 

SilvaTEAM at 150

A lot happened in the leather industry in the mid-1800s. Whole towns—like Dongen in the Netherlands, and Nottingham in England—moved into tanning. Footwear capitals such as Brockton in Massachusetts in the USA were founded as the American Civil War pushed up demand for leather, saddlery and shoes. Most of all, the introduction of steam power allowed tanners to move from craft premises into the multi-story mills that were to become so quickly redundant in the late 20th century and be converted to apartment blocks and museums of industrial heritage.

It was back in 1854 that the modern extract and leather chemical major SilvaTEAM built its first chestnut extraction plant in Corsaglia di Frabosa in Italy. Whilst today's company structure may not be 150-years-old, it is nevertheless entitled to celebrate its sesquicentenary.

Previously, hides were treated directly by immersing them in water together with the wood or the bark of materials rich in tannin, such as oak or gallnuts. This created huge problems in the worldwide leather industry as tanners tried to work out whether to take the hides to the bark or the bark to the hides. The establishment of large scale tanneries in modern buildings meant that the tannin had to move to the tanneries and the demand for extract was born.

With the extract, the amount of time required to perform the tanning process

was reduced to a month.

The plant in Corsaglia di Frabosa was, however, initially set up for weighting silk for the industry in Lyons, another old industry that in those decades was experimenting with the application of industrial processes. This small factory, which at the time had an annual capacity of about 300 tons of liquid extract, is the first of those that over 150 years merged to form the SilvaTEAM Group.

In the following 50 years, about 20 other chestnut extraction plants were set up in Italy. These facilities had a production that oscillated between 300 and 1,000 tons annually of pure tannin.

Owners of the factories in Frabosa (1872), Mondovì (1906), Pamparato (1856) and Corsaglia (1854), Jemina & Battaglia found themselves competing with the Ledoga company, that then was the main producer of tannin extracts in Italy, founded in Susa in 1868, in the province of Turin, by Messrs. Lepetit, Dollfuss and Gansser (whose names served as the basis of the acronym which survives today as a brand name on many SilvaTEAM products), a company that grew larger with five other plants in the following 50 years.

The two companies, operating principally in Piedmont enjoyed exceptional growth in the Piedmontese ►



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tanning industry, then one of the largest and most advanced in the world.

Under the energetic guidance of Carlo Giuseppe Battaglia, who in 1913 became managing director of the group, and his son, Andrea, an engineer, Jemina & Battaglia began a series of important alliances and investments in the tannin sector, that in a period of 30 years made it one of the main producers in the world, to form the nucleus of SilvaTEAM. In 1915, Jemina and Battaglia struck a distribution agreement of its own products with Ledoga.

In 1904, in Buenos Aires, Roberto Emilio Lepetit, together with Carlos Notinger, founded Notinger & Lepetit, S.A., with the idea of exporting quebracho wood to the Dufour & Lepetit factory in Sanpierrez (Genova, Italy), where it would be transformed into tannin. Having obtained, from the Argentinean government, a concession of 120,000 hectares of forest in the Chaco province, the company started to export quebracho trunks, the extract from which was used in the tanning industry, then one of the main sectors of Italian industry.

In 1925, following the prohibition on the export of raw timber from Argentina, the factory in La Escondida was built which today is still one of SilvaTEAM's main centres of production.

The years that went by during the period 1920-1950 were very prosperous years for the tannin extract industry worldwide. The tanning business was constantly expanding into new areas of application. Although chrome salts were rapidly growing in favour the normal pattern for the decline of a technology is for rapid growth in the old system. Good marketing meant that most of the tanning industry was still focused on heavy articles that required large quantities of tannin. In 1949, world consumption of tannin extracts reached a record total volume of 450,000 tons.

In 1960, Ledoga and Jemina & Battaglia decided to merge their chestnut extract businesses, creating Industria Chimica Legno, S.p.A.

This allowed the concentration in a new plant in San Michele Mondovì of all the Piedmontese chestnut extract factories, the expansion of this in Bagni di Lucca, and the construction of a new facility at Rende, in Calabria, thereby reducing to only three the number of Italian chestnut extract factories.

Since 1970, the development of SilvaTEAM has turned to the increase of capacity, to qualitative improvement, and to the increase in efficiency of the three



Italian facilities as well as the one in Argentina, all the result of the restructuring of production centres over the past 10 years.

The construction of imposing spray-dryers was a result of the passage from sales of tannin in block form, up until that point the prevailing offering, to that in spray-dried and soluble powder form.

In short, focusing attention increasingly on fine chemicals, acquisitions and investments have been made designed to complete the range offered by its sales network that continues to be reinforced and kept up to date; a strong boost in research into new tannin applications has been generated as well.

As a result, other than a world leader in vegetable extracts, SilvaTEAM is today the biggest producer of leather syntans and fatliquors in Italy, and the only producer in South America of furfural and furfurylic alcohol.

The evolution of SilvaTEAM makes a superb business case as it really follows 150 years of recognising a core competence and using that to diversify into new markets with a mix of basic and innovative products.

In the meantime, the vegetable extracts market has stabilised, thanks in part to Italian fashion, the marketing efforts of the Tuscan vegetable tanners, and to the strong

advance of the luxury leathersgoods market in recent years.

The SilvaTEAM brand appeared on the market in 2000, and is now the umbrella for the group. The name Silva has a long history and the term Team marks an evolution. "On the whole today Silvachimica presents itself on the market as SilvaTEAM," says Gianni Solunto, board member and commercial director of SilvaTEAM. "In January 2000 all internal company relations were redrawn, and Silvachimica was born, concentrating the production of chemical products for tanning (synthetic tannins, fatliquors made as ICL and Soda brands, auxiliary agents); also part of the Silva group are Ledoga, manufacturer of chestnut extract; the Argentine Indunor, which is also owned by SilvaTEAM, produces quebracho extract, syntans, furans and other chemicals. In 2001 the tara tannin factory in Peru, and a distribution company in Brazil were created. In 2004 we started direct distribution in Cina and Veneto with SilvaTEAM Guangzhou and Veneto, respectively."

In terms of leather products the SilvaTEAM offer is extensive and includes chestnut, quebracho, and tara extracts, synthetic tannins, and a variety of leather auxiliaries, fatliquors and oils, as well as some resins. The company has attained all international quality standards including the recently awarded ISO 14001 environmental certificate for Silvachimica s.r.l. in S. Michele Mondovì.

Tradition and innovation go hand in hand in SilvaTEAM, and it is its pioneering and innovative spirit that has allowed such exciting diversification while still retaining commitment to a vegetable concept. This also involves collaboration with chosen partners such as that in 2003 with Feevale University of Novo Hamburgo.

Its new metal-free and low formaldehyde leather, obtained at Silva's research and development laboratories, is proven anti-allergenic, noncarcinogenic, non-toxic and completely ecological. The treatment is carried out with natural vegetable extracts such as chestnut, quebracho and tara. This special processing confers an intense fragrance of natural products to the leather, with a pleasant touch; in addition, with this type of leather, processing wastes, as for the finished products themselves, are totally recyclable. This metal-free system has been in use in the tanning of leather for automobiles, but is now going into new areas such as leathersgoods, footwear and apparel. ➤



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An Italian tannery machine engineer adapts to a changing world of leather

The leather sector in North Italy's Vicenza province in the two river valleys, centred upon the town of Arzignano, is originally based on a small local tanning industry dating from the 1930s and 1950s. Today it numbers approximately 300 tanners, finishers, subcontractors and merchants. An infrastructure of more than 70 machinery and engineering companies, some large and many small, operates in the same geographical area, supporting the leather side. Clearly, the formation of this dedicated cluster brought about a worldwide recognition of the special qualities of the leather and the machinery produced, as well as the resulting high service level emanating from the region.

The fast changing global trading and manufacturing patterns are increasingly putting their footprint into the leather valleys affecting current activities and causing much agonising about what the future may have in store. Bergi vice president and commercial director Mauro Bergozza is thoughtful: volume manufacture in the cluster of upholstery, automotive and footwear leathers can only decline in the medium and long term. Adapting itself to the circumstances the local leather sector is likely to move sideways in the direction of niche leather developments. Bergozza speculates that the scope for smaller manufacturing units will be limited, leading to closures and perhaps amalgamations. Groups will become larger and manufacture will continue to be moved to lower labour cost countries.

The impact upon the machinery sector will follow quickly, Bergozza believes, and the changing conditions will need to be faced up to if healthy engineering support is to remain viable. The home market will shrink and there will be competition from low cost area manufacturers in terms of price and perhaps lower performance requirements. Planned, gradual and sensible downsizing of machine building in

the cluster will need to be accepted. Changing the thinking along these lines is likely to be a recipe for survival, not only for business but also for the ability to continue research and development, albeit at a slower pace.



A benchmark in tannery machine development, production and service

Bergi, an organisation equipped intellectually and physically to maintain its leadership in the design and construction of modern leather producing equipment, is determined to remain a major player in the field. Established in 1965 by Giovanni Bergozza, company president, with the aim of providing the engineering equipment needed by the explosive expansion of the Arzignano centred cluster, Bergi has developed a comprehensive range of machines.

Undoubtedly living in the middle of what in the second half of the 20th century has become the most important and respected group of leather makers in the world has been a decisive factor not only in the quality and productivity of Bergi made plant but also in the formation of its business philosophy. Not to be underrated in this context is Bergi's commitment to customer support in terms of responding to specific requirements of individual leather manufacturers, which has led to Bergi acquiring a truly unique accumulation of development experience. Devotion to an unceasing evolution of functional design combined with willingness and ability to

adapt or even modify standard design machines to produce very special leathers, often with niche characteristics, has resulted in a worldwide reputation for high performance machinery. The approach has brought notable success with, for example, two of the latest developments, the embossing and ironing press Superstar and the Supercoat rollcoater. Both machines benefit significantly from the many years of experience gained by the technical personnel involved in the study of specific client requirements and devising appropriate solutions, usually based upon a well proven standard design, but with refinements.

The main Bergi factory in Arzignano employs 95 people, a third of them specialised technicians and researchers along, with sales and service personnel. It is a closely knit group of people, many with a long length of service with the company. Indeed, Bergi, both locally and with their clients enjoys a reputation for its ability to provide loyal, consistent and reliable support. Close co-operation between Bergi technical staff and the company's suppliers and subcontractors is an inherent ingredient in the success of meeting special requirements. Not infrequently outsourced componentry needs to be adapted in detail and only the relationship developed with the supplier makes this possible.

Across the production profile ranging from rotary ironing/embossing machines through setting, buffing, dedusting and polishing machines, rollcoaters and finishing dryers as well as stacking and handling plant, more than 200 units were turned out in 2004. With the changing pattern of leather making around the world, the importance for Bergi of the home market has gradually declined. Exports to the Far East and South Asia now take the lion's share of output followed by South America, Europe and to a lesser extent the USA, Mexico and South Africa. 🌐