

LEATHER IN TUSCANY

How the sector operates

Within the Tuscan fashion system, the tannery and leather industry, concentrated in the typical industrial district of Santa Croce-San Miniato, holds a highly relevant role in terms of turnover and employees. Although it constitutes a single production chain, the separation between raw material processing – vegetable tanning on the Arno’s left bank and chrome tanning on the right bank – and production of leather accessories – which also involves third-party manufacturing – suggested the constitution of two focus groups.

The production of leather accessories (except from shoes – the focus group has not surveyed footwear so far) is concentrated in the areas of Scandicci, Lastra a Signa, Impruneta and Pontassieve, where in the post-war period an old tradition of craftsmanship has become an important industry that today, with the broadening of markets and distribution channels, is characterized by firm concentration and production diversification. “Quality” has been the watchword for change, bringing about advanced mechanization and high technology and, at the same time, recovery of manual skills.

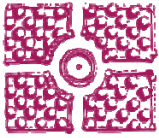
The leading firms belong to multinational brands or else have managed to launch their own products through monobrand stores. At the same time, the high density of production units and competencies has made the district attractive for international companies.

The relevance of vocational training has grown in line with the organizational changes introduced by the most dynamic players, as demonstrated by the existence of the **High School of Leather Working** (Alta Scuola di Pelletteria) and the **Made in Italy Tuscany Academy** (MITA), training institutions in which local enterprises are directly involved.

Skill needs: strategic competencies and job profiles

The search for qualified personnel is a priority for leather firms also because, notwithstanding the deep transformations occurred in the last decades, little attention has been paid to the issue of training from both the institutional and the entrepreneurial world. Traditionally, the manual skills have been passed down from one generation to the next through apprenticeship and coaching, but this mechanism has been broken. The backwardness of training institutions, and the retirement of the last skilled workers make entrepreneurs feel such competencies might be permanently lost.

The new production methods require higher qualified personnel and, consequently, for a modular training system aimed at improving the available workforce, also because internal coaching has become too time- and resource-consuming for the speeded-up production cycle. The most wanted professionals in the different processing steps are: **pattern makers, prototype machine operators, raw material (hides and metals) operators, skivers, cutters, stitchers, and assemblers**. At the same time, the extreme fragmentation of production entails the need of training coordinators and tutors that know all the supply-chain functions and passages, and have monitoring and problem-solving abilities.



A taxonomy of the required professional qualifications

The table below combines data from three sources: the mandatory employment notices from firms to job centres, introduced in 2008; the IRPET survey on the training needs of the Tuscan firms having recorded higher-than-average turnover and employment rates after the crisis; the focus groups with firms belonging to strategic sectors for regional growth. The quantitative and qualitative data collected were used to classify occupations by employment capacity (number of newly employed), and job stability (combination of days worked and contract type).

Overview of the most sought-after and in-demand leather jobs*

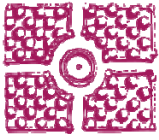
		Job stability	
		Medium-high	Medium-low
Employment capacity (number of newly employed)	Medium-large	Suitcase and bag makers, and related workers (even in pleather and cloth articles) Handicraft workers in fabric, leather and related materials Furriers, fur pattern makers and related workers Leather and fur tanners	Non-qualified industrial workers and related workers Artisan tailors, cutters, pattern makers and hatters
	Medium-small	Leather- and fur-products machine operators in large-scale processing and production Industrial sewing-machine operators, fabric clothes and similar	Other textile and apparel machine workers, and related workers Production planning technicians Footwear craftsmen and workers, and the like Manufacturing technicians

*Key professional qualifications, whatever class they belong, are highlighted in bold.

The analysis of recruitment capacity resulted in two occupation groups (medium-large and medium-small), depending on the number of newly employed (larger/smaller than the median value). The analysis of job stability resulted in two occupation groups (medium-high and medium-low), depending on the value of the composite indicator (higher/lower than the median value).

Territorial localization

The map below shows the location of local units in the sector, highlighting the most dynamic firms in terms of turnover rate and number of workers for the period 2007-2011. This graphical representation allows to appreciate the degree of diffusion/concentration of production activities on a regional basis.



The leather firms

