

Invest in FASHION in Emilia-Romagna



The **fashion system** in Emilia-Romagna has a significant presence in the regional economy. Its real competitiveness is based on quality and design, local specialization, big brands and the ability of its products to have an impact on an international level.

Investors in the fashion industry in our region can count on the support and availability of specialized human resources, innovation centres and local suppliers of services and products which are all part of the system.

Invest in Quality and Design

The high quality of the "made in Italy" label in the fashion world stems from the high quality of its design and styling elements. This sector employs almost 1,300 people (on par with the number employed in object design). These fashion creators are at the disposal of all of companies working in clothing, textiles, footwear, jewellery, accessories and ornamental objects. Moreover, the high quality is also due to the technologically advanced machinery in use, often coming from our very own regional mechanical industry and from the very high standard of manual skills of our specialized professionals.

Fashion from Emilia-Romagna on an International Level

The quality of our products is internationally recognised and is confirmed by our export figures which validate the great skill of regional companies at penetrating international markets with an upward trend not only on a general level but especially when it comes to "textiles and clothing". The sector lists seven international trade fairs which act as a meeting point between regional entrepreneurs and international operators in the fashion field.

Invest in local Specialization

The business structure is made up of 13,000 companies, mainly small and medium sized enterprises which work on a third party basis, specializing in sub-supplying and niche production. Some areas have created the tradition of districts through a high concentration of local operators. One particular case is Carpi, in the Modena area, which employs 8,000 people in the sector. A high concentration can also be found in Bologna and Reggio Emilia. Other districts are shown by individual sector (see the following pages).

LEADING FACTORS

- Leading well known brands
- Almost 13% of national exports of clothing and textiles with an upward trend
- 13,507 companies
- Consolidated districts and companies which are part of a network
- Seven international trade fairs with a total of 40,000 visitors
- A large number employed in the design sector
- Innovation centres specialising in the sector with the involvement of almost 500 companies
- Specialized training for specific job roles

SOME OF OUR REGIONAL BRANDS

CLOTHING



FOOTWEAR



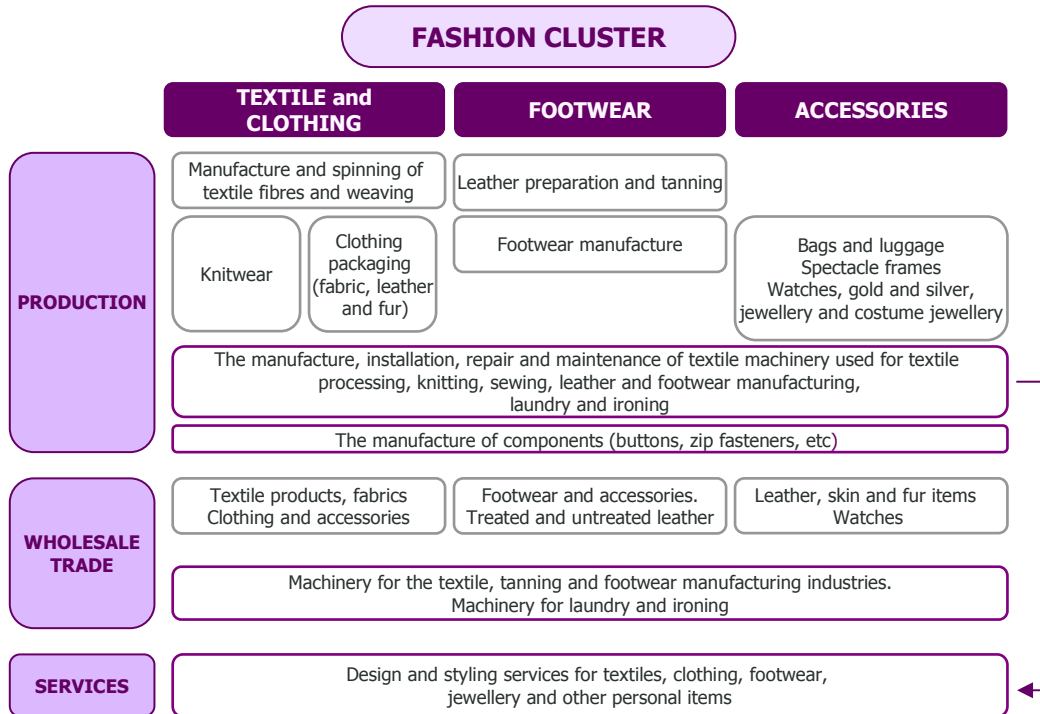
ACCESSORIES





Fashion clusters: types of businesses and sectors

The fashion industry is spread throughout the region, organised according to a logical system of cluster production: this means that the businesses involved tend to cover all the phases of production from start to finish (manufacture, services and the commercial aspect) by creating a successful operating system amongst themselves. Within the fashion system we can single out **three main sub-clusters: textile and clothing, footwear and accessories.**



Companies and the number employed

The fashion cluster and sub-clusters: companies and the number employed (absolute values and quotas). Databank: Asia 2004

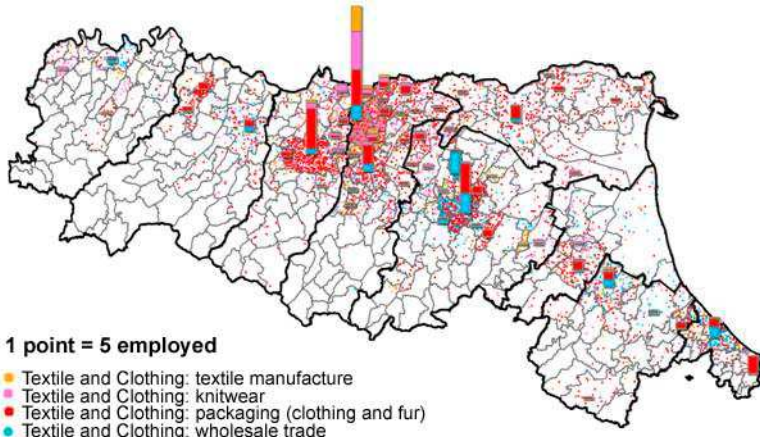
Sub-Clusters	Macrosectors	Companies	Quota of companies in the entire cluster	Number employed	Quota of number employed in the entire cluster
TEXTILE AND CLOTHING	Textile manufacturing	710	5.3%	5,239	7.9%
	Knitwear	1,464	10.8%	8,771	13.2%
	Packaging (clothing and fur)	2,866	21.2%	20,847	31.4%
	Wholesale trade	3,426	25.4%	7,715	11.6%
Sub-Cluster total		8,466	62.7%	42,572	64.0%
FOOTWEAR	Footwear manufacturing	564	4.2%	6,590	9.9%
	Wholesale trade	184	1.4%	573	0.9%
Sub-Cluster total		748	5.5%	7,163	10.8%
FASHION ACCESSORIES	Accessory manufacturing	2,838	21.0%	12,214	18.4%
	Wholesale trade	224	1.7%	639	1.0%
Sub-Cluster total		3,062	22.7%	12,853	19.3%
CROSS SECTORS	Mechanical	239	1.8%	1,694	2.5%
	Machinery trade	82	0.6%	318	0.5%
	Components	910	6.7%	1,884	2.8%
Sub-Cluster total		1,231	9.1%	3,869	5.9%
Fashion cluster total		13,507 companies		66,485 number employed	
Fashion cluster total - Manufacturing		9,591		57,240	
Fashion cluster total - Wholesale trade		3,916		9,245	
Design Sector total - (across more than one cluster)		849		1,291	



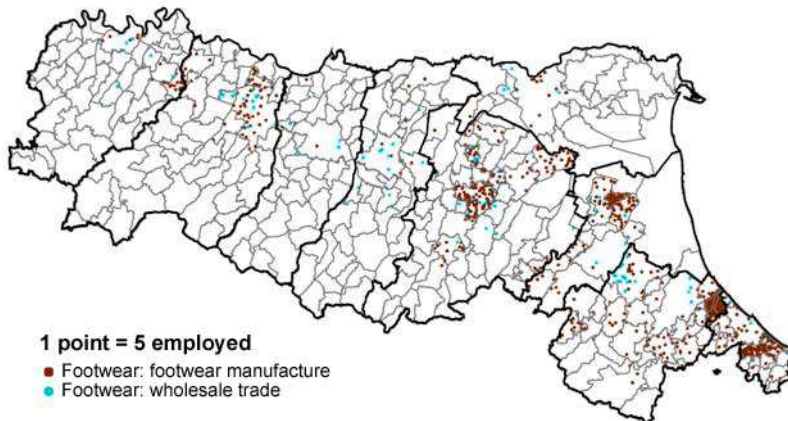
Fashion in the region

The maps below clearly show that the textile and clothing sub-cluster lists more businesses and also more employed in its sector than the other two sub-clusters.

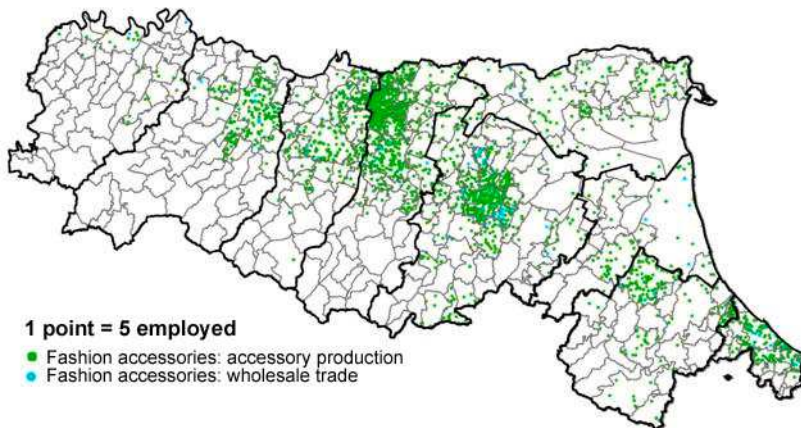
The fashion cluster – the textile and clothing sub-cluster. Number employed 2004



The fashion cluster – the footwear sub-cluster. Number employed 2004



The fashion cluster – the fashion accessories sub-cluster. Number employed 2004



Districts and areas with higher concentrations of numbers employed

Sub-cluster Textile and Clothing

- The **Carpi** district in the province of **Modena** (about one third of the sub-cluster), small and medium sized companies
- **Bologna and Reggio Emilia**, large and medium sized companies
- Spread in smaller numbers over other provinces

Sub-cluster Footwear

- The **Forli-Cesena, Rimini (San Mauro Pascoli, Savignano, Gatteo)** areas list more than 170 local businesses and 2,900 employed. Specialization in luxury level shoes
- **Ravenna** (Fusignano, Lugo di Romagna, Bagnacavallo)
- The **Emilia** area, particularly **Bologna** (more than 1,000 employed). Oriented towards traditionally made men's shoes

Sub-cluster Fashion Accessories

- A high concentration in **Modena** (Carpi in particular) and **Bologna**
- Followed by **Parma** and **Rimini**



Fashion from Emilia-Romagna on an international level

Exports

In 2006, the regional fashion industry exported a total of around 3,814 million Euros of goods (9.9% of the national total). Exports of "Textiles and clothing" from our region amounted to 12.6% of the national total, "Accessories" 11.4% (Databank: Istat - Coeweb).

Where we export to

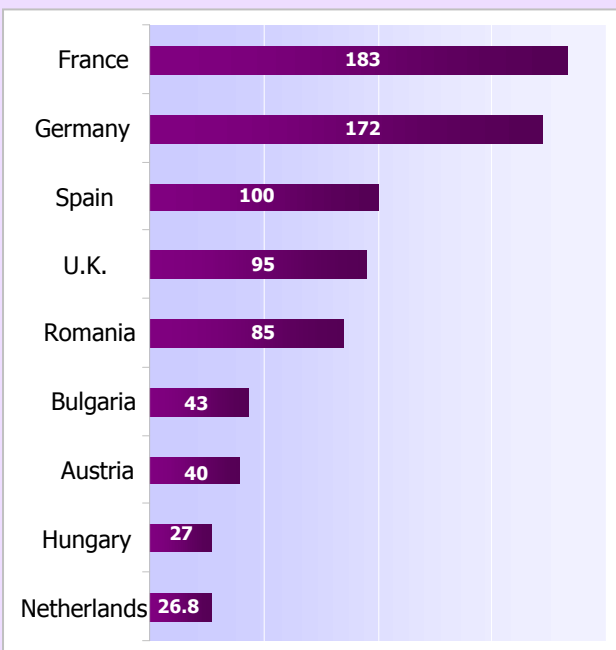
Percentage of total exports per destination area – 2006

EU 27	Other European Countries	Asia	North America	Other countries
56.6%	19.9%	11.2%	6.3%	6.2%

The main destination of our exports is Europe, however, our exports make it in varying quantities to the most important markets worldwide.

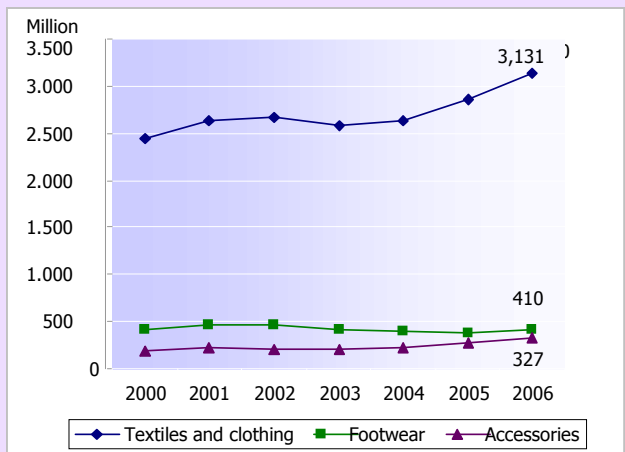
The main EU countries we export to

All figures given in millions of Euros – 2006



Export trends

The variations over the long and short period show the growth in exports mainly sustained by "textiles and clothing" which is the most important sub-cluster (82% of exports from the fashion cluster).



Exports of fashion "Accessories" have experienced the highest growth rate of the three.

Fashion cluster – Variation in % of exports

	2000-2003	2003-2006	2000-2006
Textile and Clothing	+5.8%	+21.2%	+28.3%
Footwear	+1.8%	-1.1	+0.7%
Accessories	+6.3%	+55.4%	+65.2%
TOTAL for the fashion cluster	+5.3%	+18.9%	+25.2%



Fashion from Emilia-Romagna on an international level

Trade Fairs

LINEAPELLE www.lineapelle-fair.it	<i>International Show for leather, accessories, components, synthetic leather and examples of shoes, leather goods, clothing and furniture. 1,279 exhibitors (380 foreign ones). 22,900 visitors (40% from abroad).</i>
FASHION SHOE AND LEATHER GOODS www.fashionshoe.bolognafiere.it	<i>International showcase of medium to high and high to luxury quality footwear, bags and accessories with 1,342 exhibitors from 40 countries.</i>
SIBA www.siba.piacenzaexpo.it	<i>International salon for buttons, accessories and subsidiary fashion items, raw materials, machinery, new technology available to the fashion industry. Lists 6,000 professionals operating in the sector from 55 different countries.</i>
FIRST ALTERNATIVE www.firstalternative.it	<i>Trade fair for the Italian retail market with up-to-date distribution ideas and a meeting point for professional international buyers from the fashion and accessory sectors. Around 2,470 visitors from the profession (i4% from abroad) with over 140 companies showing their creations.</i>
SIMAC www.assomac.it	<i>International salon for machinery and technology for the footwear and leather goods manufacturing industry. Over 14,000 m² with over 300 companies exhibiting.</i>
TANNING-TECH www.assomac.it	<i>International salon for machinery and technology for the tanning industry. Around 200 exhibitors and numerous foreign delegations in 6,000 m² of space</i>
RICCIONE MODA	<i>International competition for young designers run by leading fashion brands.</i>

Top Investors

Some important foreign investors in the fashion industry in Emilia-Romagna

Companies	Investors	Country of origin	Type of business
CALZATURIFICIO MA.FRA SRL MANIFATTURA FERRARESE SRL BALDININI SRL OMAS SRL G.F.M. INDUSTRIA SPA CASOR SPA	LOUIS VUITTON MOET HENNESSY SA	France	Men and women's footwear; clothing, bags and leather items, accessories
REDWALL ITALIA ROSSI 1924 SPA	ARPELS	Belgium	Leather goods (investment in Redwall Italia)
PRL FASHIONS OF EUROPE SRL	POLO RALPH LAUREN CORP	United States	Wholesale trading of clothing (Polo Ralph Lauren)
BESTSELLER ITALY SPA BESTSELLER UNITED ITALY SPA	BESTSELLER A/S	Denmark	Textile and clothing: consulting, study, planning, design and styling. Wholesale trading of clothing
SERGIO ROSSI SPA	PINAULT-PRINTEMPS- REDOUTE SA	France	Footwear (investment in the Sergio Rossi brand)
J.C. DE CASTELBAJAC ITALY SRL	MARCHPOLE HOLDINGS LTD	United Kingdom	Manufacturing of clothing and accessories
PAXAR ITALIA SRL	PAXAR CORP	United States	Manufacturing of labels, tags, sticky and printed labels for clothing
ATECA SPA	EDWIN CO. LTD	Japan	Casual clothing (investment in the garment sector of ATECA)



Facilities available to fashion businesses

University and Training courses

Degree courses

- Course in Fashion Culture and Techniques
- Post-grad course in Fashion Systems and Communication

At the Università di Bologna (Rimini branch)

www.moda.unibo.it

Masters and specialised courses

- Fashion Campus
International fashion school started in Carpi in the heart of the clothing district. Offers advanced level Masters and other courses which correspond with current issues and requirements of both the cluster and the market.

www.campusdellamoda.it

Professional and vocational courses

- Courses in: Fashion Designing and Styling and Sartorial Pattern Making
- Master's course validated by the Istituto di Moda Fashion School (in the process of being set-up)

At the "Scuola di moda Vitali" (Ferrara)

www.scuolavitali.com

- Three year courses and six month master's courses in design, fashion design, business communications and marketing

- Intensive and specialized courses based on the requirements of individual students and companies

At L.UN.A, Libera Università delle Arti, private fashion and design school, www.uniluna.com

- Courses in Fashion and Services connected with the Textile and Clothing sector. With around 300 companies which annually provide skilled support for planning activities and the setting up and running of training activities

At Carpiformazione (Carpi, Modena)

www.carpiformazione.it

- Technical school covering different aspects of clothing and workshops for planning, creating models and industrial prototypes

Presso Parmamoda (Parma) - www.parmamoda.it

Professional institutes with fashion courses and options

- Istituto C. CATTANEO (Modena)
- IPSIA GALVANI (Reggio Emilia) - www.galvanire.it
- IPSIA BEDONIA (Parma)

<http://ipsiabedonia.scuolaer.it>

Innovation Centres

CERCAL - Centro Ricerca e scuola internazionale CALZaturiera

www.cercal.org

Lists around **80 associate footwear companies** and acts as an information centre for the footwear sector.

DESIGN CENTER BOLOGNA

www.design-center.it

A centre created by the Accademia di Belle Arti di Bologna (Art and Design Academy) directed at promoting design in the Emilia-Romagna productive system. It has at its disposal the design skills of the teaching staff and graduates of the Academy and is also funded by contributions from the Emilia-Romagna Region and the Fondazione Carisbo.

Fashion district for trade customers

Centergross (www.centergross.com) is one of the main fashion districts for trade customers in the region. Located in Bologna, it employs 6000 people and consists of around 600 businesses, 60% of which are from the clothing and fashion sector. The district serves businesses and traders from the industry who come from all over Italy and abroad: Europe, Asia, America, The Middle East, etc. **Sales volumes hit over 5 billion Euros, 90% of which comes from the fashion sector.**

Business associations

The CNA-Federmoda (www.cna.it/federmoda) provides support and assistance to companies in the cluster, including trade links with foreign companies.

Invest in fashion in Emilia Romagna

For further information:



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