



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 over 800 people. 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 four 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 almost 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. A high concentration can also be found in Bologna and Reggio Emilia. Other districts are shown by individual sector.

LEADING FACTORS

- Leading well known brands
- 14,7% of national exports of clothing and textiles with an upward trend
- Almost thirteen thousands companies
- Consolidated districts and companies which are part of a network
- A large number employed in the design sector
- Innovation centres specialising in the sector with the involvement of a high number of companies
- Four international trade fairs
- Specialized training for specific job roles

SOME OF OUR REGIONAL BRANDS

CLOTHING



FOOTWEAR



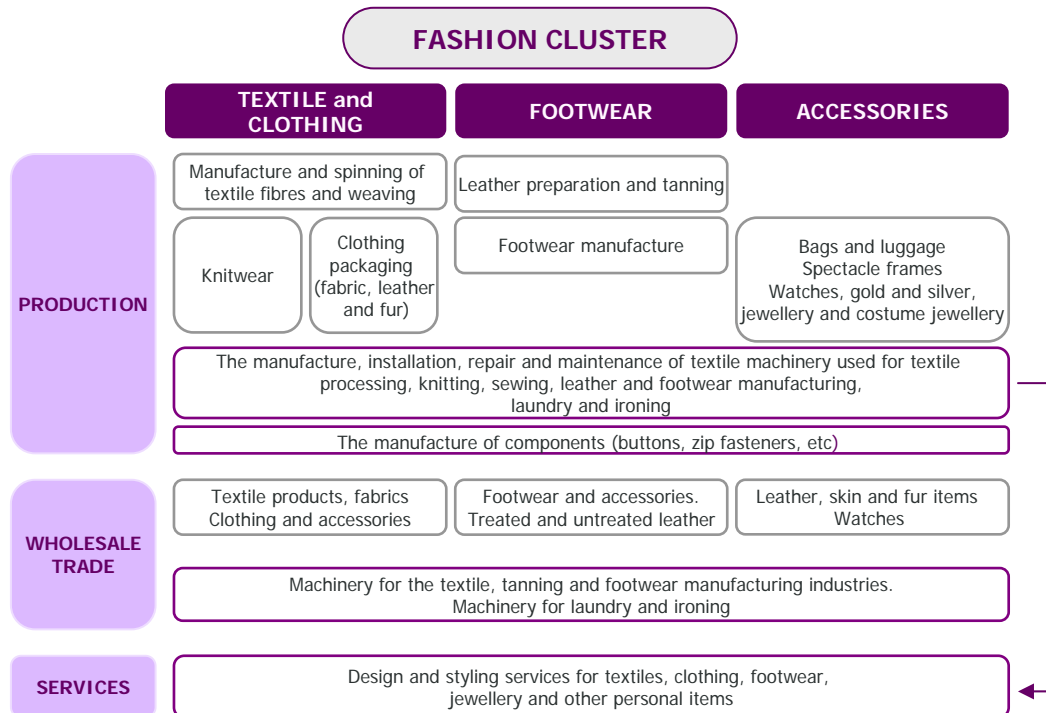
ACCESSORIES





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 2006

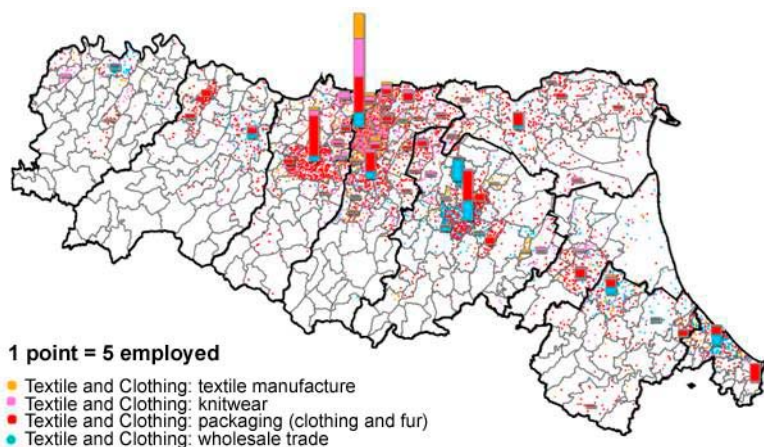
| Sub-Clusters | Macrosectors | Companies (local units) | Quota of companies in the entire cluster | Number employed | Quota of number employed in the entire cluster |
|---------------------------------------------------------------------------------------------------------------|------------------------------|---------------------------|------------------------------------------|-------------------------------|------------------------------------------------|
| TEXTILE AND CLOTHING | Textile manufacturing | 694 | 5.3% | 4,849 | 7.7% |
| | Knitwear | 1,267 | 9.8% | 7,791 | 12.3% |
| | Packaging (clothing and fur) | 2,763 | 21.3% | 19,674 | 31.1% |
| | Wholesale trade | 3,283 | 25.3% | 7,934 | 12.5% |
| | Sub-Cluster total | 8,007 | 61.7% | 40,248 | 63.6% |
| FOOTWEAR | Footwear manufacturing | 551 | 4.2% | 6,016 | 9.5% |
| | Wholesale trade | 213 | 1.6% | 588 | 0.9% |
| | Sub-Cluster total | 764 | 5.9% | 6,605 | 10.4% |
| FASHION ACCESSORIES | Accessory manufacturing | 2,771 | 21.4% | 11,944 | 18.9% |
| | Wholesale trade | 227 | 1.7% | 662 | 1.0% |
| | Sub-Cluster total | 2,988 | 23.1% | 12,606 | 19.9% |
| CROSS SECTORS | Mechanical | 210 | 1.6% | 1,417 | 2.2% |
| | Machinery trade | 78 | 0.6% | 292 | 0.5% |
| | Components | 920 | 7.1% | 2,145 | 3.4% |
| | Sub-Cluster total | 1,208 | 9.3% | 3,854 | 6.1% |
| Total FASHION | | 12,977 local units | | 63,312 number employed | |
| Fashion cluster total - Manufacturing | | 8,314 | | 55,475 | |
| Fashion cluster total - Wholesale trade | | 3,801 | | 9,477 | |
| Design Sector total - (across more than one cluster, on par with the number employed in object design) | | 862 | | 1,533 | |



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 2006

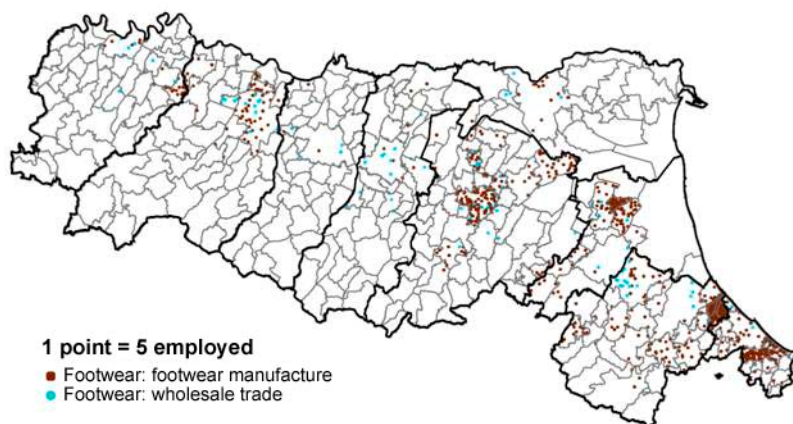


Districts and areas with higher concentrations of numbers employed

Sub-cluster Textile and Clothing

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

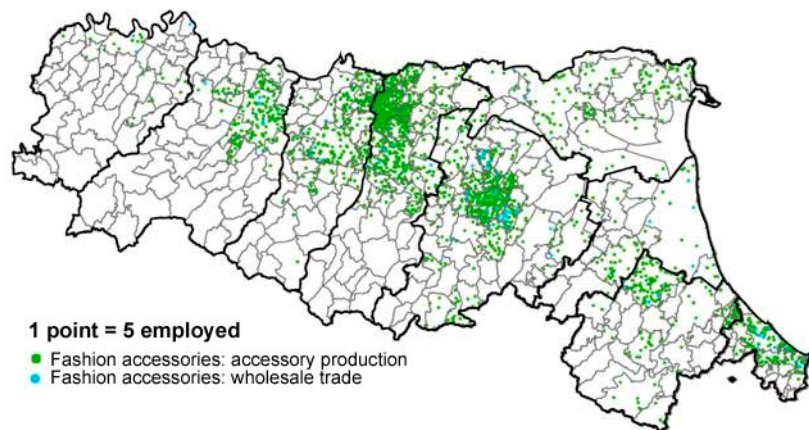
The fashion cluster – the footwear sub-cluster. Number employed 2006



Sub-cluster Footwear

- The **Forlì-Cesena** ((**San Mauro Pascoli**, Savignano, Gatteo) and **Rimini**). Specialization in luxury level shoes
- **Ravenna** (Fusignano, Lugo di Romagna, Bagnacavallo)
- The **Emilia** area, particularly **Bologna**. Oriented towards traditionally made men's shoes

The fashion cluster – the fashion accessories sub-cluster. Number employed 2006



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

Databank: Istat - Coeweb

In 2008, the regional fashion industry exported a total of around **4,591 million Euros of goods**, 11.7% of the national export of fashion and **9.7% of the regional total**. Exports of "Textiles and clothing" from our region amounted to 14.7% of the national total, "Accessories" 11.1%.

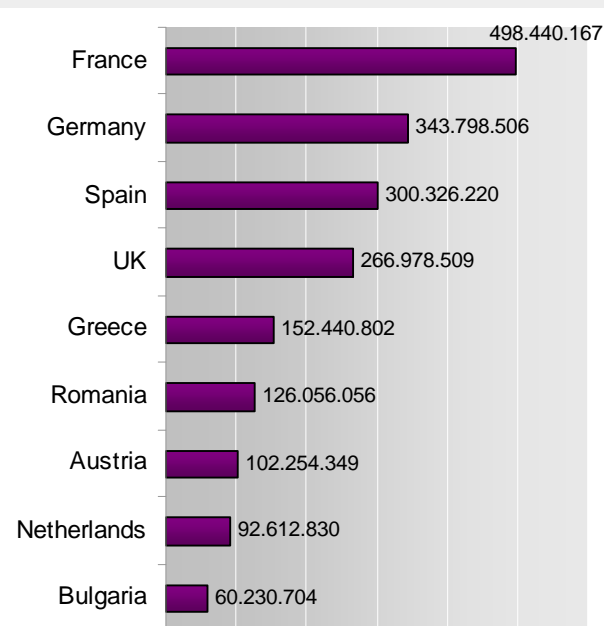
Where we export to**Percentage of total exports per destination area 2008**

| EU 27 | | Other European Countries | | | Total Europe |
|-----------|---------------|--------------------------|--------------|-----------------|--------------|
| 53,1% | | 25,3% | | | 78,4% |
| East Asia | North America | Middle East | North Africa | Other countries | |
| 9,7% | 4,8% | 3,2% | 2,0% | 1,8% | |

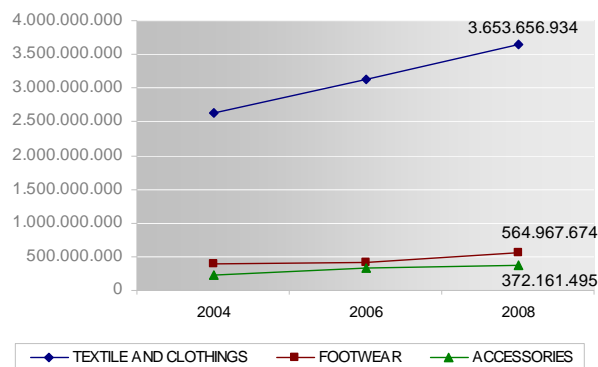
The main destination of our exports is Europe, however, our exports make it in varying quantities to the most important markets worldwide.

The main EU countries we export to

All figures given in Euros – 2008

**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 (79,6% of exports from the fashion cluster in 2008).



Exports of fashion "Accessories" have experienced the highest growth rate of the three sub-clusters, but the general trend of the cluster is positive from 2004 to 2008.

Fashion cluster – Variation in % of exports

| | 2004-2006 | 2006-2008 | 2004-2008 |
|--------------------------------------|--------------|--------------|--------------|
| Textile and Clothing | 18,7% | 16,7% | 38,5% |
| Footwear | 3,7% | 37,8% | 42,9% |
| Accessories | 42,8% | 13,8% | 62,5% |
| TOTAL for the fashion cluster | 18,6% | 18,7% | 40,7% |



Fashion from Emilia-Romagna on an international level

International Trade Fairs

| | | |
|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | LINEAPELLE www.lineapelle-fair.it | International Show for leather, accessories, components, synthetic leather and examples of shoes, leather goods, clothing and furniture. 39,708 m ² , 1,041 exhibitors (295 foreign ones). LINEAPELLE is also in China (Lineapelle Asia) and in USA (Trend Selection Lineapelle in New York). |
|  | SIBAtch www.siba.piacenzaexpo.it | International salon for buttons, accessories and subsidiary fashion items, raw materials, machinery, new technology available to the fashion industry. |
|  | SIMAC http://fairs.assomac.it | International salon for machinery and technology for the footwear and leather goods manufacturing industry. |
| TANNING-TECH | TANNING-TECH http://fairs.assomac.it | International salon for machinery and technology for the tanning industry. |

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
- 2 years specialization course in Fashion

At the Università di Bologna (Rimini branch)

www.moda.unibo.it

corsi.unibo.it/magistralemoda

Masters and specialised courses

- Fashion Campus - www.campusdellamoda.it
- 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.

Courses:

Master in: Fashion Design; Fashion Marketing and Business Management; Fashion Brand Management.

Post-grad courses in: Fashion Design; Fashion Marketing.

Professional and vocational courses

- Courses in: Fashion Designing and Styling and Sartorial Pattern Making
- Master's course in Fashion Stylism and Industrial Modelling.

At the "Scuola di moda Vitali" (Ferrara)

www.scuolavitali.com

- 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

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** (among these Baldinini, Bruno Magli, Casadei, Pollini, Sergio Rossi, Vicini) 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 683 businesses, 70% 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 about 5 billion Euros, 80% 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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