



Invest in FASHION in Emilia-Romagna

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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, a cross-sector that employs almost 2,300 people in our region. 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. The research laboratories of the **Regional High Technology Platform** support the companies in the cluster by providing cross-sector thematic technology which ranges from IT and Design to the latest mechanical inventions.

As regards the **formation of human resources**, there are various levels, such as university, professional training schools and the Polytechnic Network (technical institutes, higher level courses), a choice of Master's degrees (e.g. Master's in design, fashion and luxury goods) as well as professional and specialization courses.

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 'leather accessories' and 'footwear'. 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 7,000 companies, mainly small and medium sized enterprises which work on a third party basis, specializing in sub-supplying and niche production. If we take the cluster as a whole (including services, machine manufacturing and commercial trade) the number of regional companies involves adds up to almost 25,000. 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 the provinces of Bologna and Reggio Emilia. Other districts are shown by individual sector.

LEADING FACTORS

- Leading well known brands
- Growth in exports from the cluster from 2008 to 2012 of 18.4% and a peak increase in the leather accessories sector of 60%
- Exports from the regional cluster accounted for 12.8% of the national figures in 2012
- Almost 7,000 companies in the fashion industry
- A large number employed in the design sector
- Specialized training for specific job roles
- Consolidated districts and companies which are part of a network

SOME OF OUR REGIONAL BRANDS

CLOTHING



FOOTWEAR



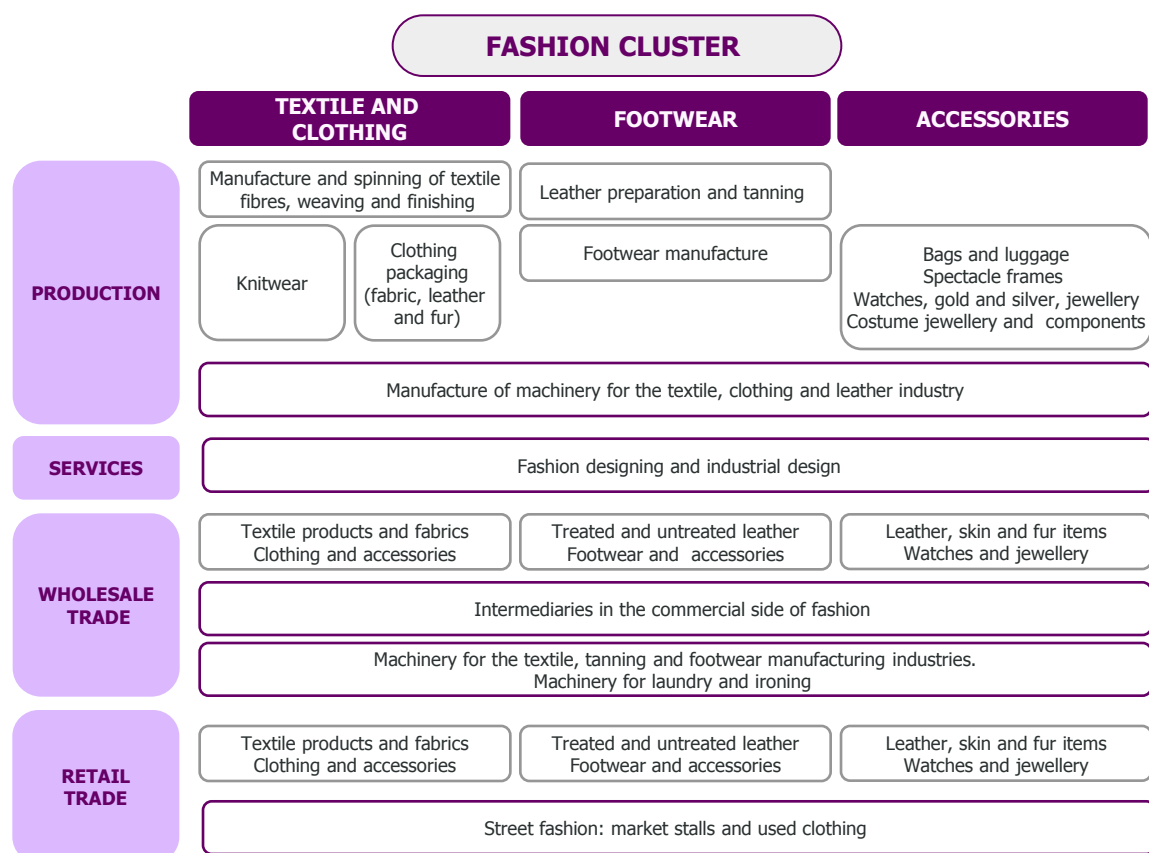
ACCESSORIES





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 sectors: textile and clothing, footwear and accessories.**



Companies and the number employed

The number employed and Local Units in the different sectors of the fashion cluster (Databank Asia 2010)

Fashion cluster	Local Units (LU)	Quota of LUs in the entire cluster (%)	Number employed	Quota of number employed in the entire cluster (%)	Average dimension of the LU
Textiles	1,366	5.5%	7,089	8.2%	5
Clothing	3,576	14.3%	25,418	29.4%	7
Footwear	420	1.7%	5,044	5.8%	12
Accessories	1,453	5.8%	6,595	7.6%	5
Totals for the fashion industry	6,815	27.3%	44,147	51.0%	6
Textile Machinery	121	0.5%	1,185	1.4%	10
Design	1,226	4.9%	2,306	2.7%	2
Wholesale trade	3,580	14.4%	9,166	10.6%	3
Retail trade	13,204	52.9%	29,784	34.4%	2
Total of other companies	18,131	72.7%	42,441	49.0%	2
Totals for the cluster	24,946	100.0%	86,587	100%	3

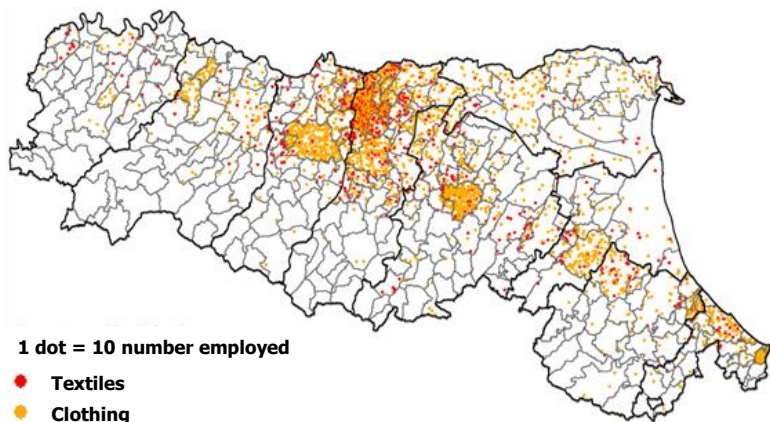


Fashion in the region

Source: Databank Istat-ASIA 2010

The maps below clearly show that the textile and clothing sector lists more businesses and hence more people employed in its sector than the others.

The fashion cluster – Textiles and clothing - Number employed



Areas with higher concentrations of numbers employed

Textile and Clothing

- The **Carpi** district in the province of **Modena**, with small and medium sized companies
- **Bologna and Reggio Emilia**, large and medium sized companies
- Spread in smaller numbers over other provinces

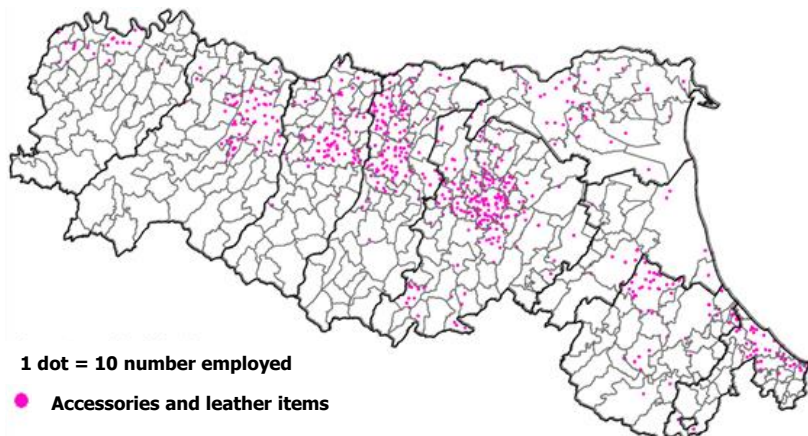
The fashion cluster – Footwear - Number employed



Footwear

- The **Forlì-Cesena (San Mauro Pascoli, Savignano, Gatteo) and Rimini** area. 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 – Fashion accessories - Number employed



Fashion Accessories

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



Fashion from Emilia-Romagna on an international level

Exports

Databank: Istat - Coeweb

In 2012, the regional fashion industry exported a total of around 5,527 million Euros of goods (12.8% of the national export of fashion) and 11.1% of the regional total that year.

Where we export to

Percentage of exports per destination area – 2012

EU 27		Other European Countries	Total Europe
56.3%		18.5%	74.8%
East Asia	North America	Middle East	Other countries
10.5%	5.0%	3.6%	4.6%

The main destination of our exports is Europe, with relevant importing countries also outside EU (e.g. Russia and Switzerland).

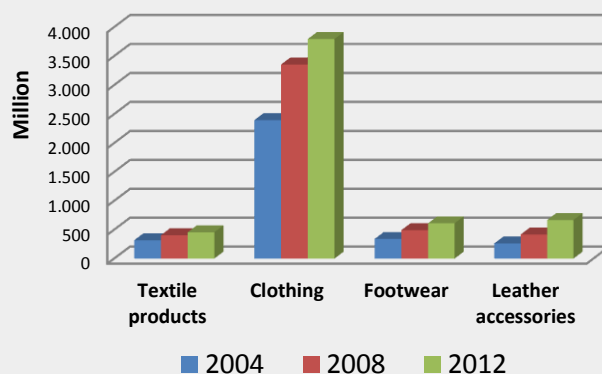
The top ten importing countries in 2012 and variations in percentage terms compared with 2000

Country	Export figures (Euros)	Var. % (2000-2012)
France	678,609,042	92.1%
Russia	656,936,060	432.0%
Germany	494,325,953	-10.3%
UK	436,926,605	114.7%
Spain	305,945,404	98.4%
USA	258,431,256	-8.0%
Japan	218,591,594	2.0%
Switzerland	162,065,809	61.9%
Romania	150,464,347	138.4%
Belgium	136,098,053	37.7%
World	5,526,936,052	79.2%

Export trends

Fashion cluster responded promptly to the economic crisis, showing in 2012 values significantly higher than those of 2008.

Export flows per economic sector (source: Istat)



In the 2012-2004 period, the regional fashion cluster increased its exports up to +66.8%. The 'leather accessories' sector is the one that shows the highest growth rates.

Fashion cluster – Variation in % of exports

	2008-2004	2012-2004	2012-2008
Textile products	27.9%	43.7%	12.4%
Clothing	40.0%	58.4%	13.1%
Footwear	44.8%	79.6%	24.0%
Leather accessories	59.3%	154.9%	60.0%
TOTAL for the Fashion cluster	40.8%	66.8%	18.4%



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. Held at the Bologna Trade Fair site. 39,764 m² of exhibition space, 1,039 exhibitors of which 299 are foreign (data April 2011).

**SIBAtch**www.siba.piacenzaexpo.it

International salon for buttons, accessories and subsidiary fashion items, raw materials, machinery, new technology available to the fashion industry held at the Piacenza Trade Fair site.

**SIMAC
TANNING-TECH**<http://fairs.assomac.it>

SIMAC - International salon for machinery and technology for the footwear and leather goods manufacturing industry held at the Bologna Trade Fair site.

TANNING-TECH - International salon for machinery and technology for the tanning industry held at the Bologna Trade Fair site.

Foreign Investors

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

Companies	Investors	Country of origin	Type of business
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
PAXAR ITALIA SRL	PAXAR CORP	United States	Manufacturing of labels, tags, sticky and printed labels for clothing
OMAS SRL	HENGDELI HOLDINGS LIMITED	China	Fountain pens



Facilities available to fashion businesses

University and Training courses

Degree courses

- Course in Fashion Culture and Techniques
- 2 year specialization course in Fashion

At the Università di Bologna (Rimini branch)

www.moda.unibo.it

<http://corsi.unibo.it/magistralemoda>

Higher Education Specialization courses

- Course in Fashion Design and Research in the footwear sector

CERCAL (San Mauro Pascoli, Fc) www.cercal.it

For the catalogue of Higher Education in the Emilia-Romagna Region: www.altiformazioneinrete.it

Masters and professional courses

- Masters in design, fashion and luxury goods

At the Alma Graduate School di Bologna

www.almaweb.unibo.it/internationalmba

- Master's course in Fashion Stylism and Industrial Modelling
- Professional courses in Fashion Designing and Styling and Sartorial Pattern Making

At the "Scuola di moda Vitali" (Fe)

www.scuolavitali.com

- Courses in design, fashion design, business communications and marketing

At L.UN.A, Libera UNiversità delle Arti (Bo) www.uniluna.com

- Courses in fashion and fashion graphics

At the Campus della moda (Carpi, Mo)

www.campusdellamoda.it

- Courses in all types of artistic design for business: graphic design, photography, fashion and design in general

At LABA Rimini - Libera Accademia di Belle Arti (Rn)

Training Institutes

Field: fashion, footwear and design

- "Malpighi" Technical College (Crevalcore, Bo) - www.malpighi-crevalcore.it
- "Saffi-Alberti" - Technical College - "A. Saffi" Technical Institute (Fc) - www.delfo.forli-cesena.it/it
- "Nobili" Technical College (Re) - www.iisnobili.it
- "G. Galilei" Technical College (Mirandola, Mo) - www.galileimirandola.it
- "P. Levi" Professional Institute (Pr) www.ipsiaparma.eu
- "M. Curie" Professional Institute for the Handmade Footwear and Clothing Industries (Savignano sul Rubicone, Fc) www.mcurie.com
- "G. Vallauri" Professional Institute for the Handmade Industry (Mo) www.vallauricarpi.it
- "F. Arcangeli" High school specializing in art, craft and culture (Bo) www.isart.bo.it
- "B. Cassinari" High school specializing in art, craft and culture (Pc) www.artisticopiaccenza.it
- "G. Chierici" State Art High school (Re) www.liceochierici.re.it

Training Institutes

Courses for the fashion and accessory sectors

- **CARPIFORMAZIONE** – Centre for training in fashion and services connected with the textile and clothing sector (Carpi, Mo) www.carpiformazione.it
- **CERCAL** – Research Centre and international school for footwear (San Mauro Pascoli, Fc) www.cercal.org
- **CENTOFORM** (Fe) www.centiform.it
- **ECIPAR** (Emilia - Romagna) www.ecipar.it
- **CONSORZIO F.I.T.** (Mo) www.consorziokit.it
- **ASSOFORM** (Training institute run by Confindustria, Rn) www.assoform.rn.it

Research and Innovation

High Technology Network – ICT & Design Platform

Laboratorio RFID&VIS-LABS

Interdepartmental research centre at the University of Parma which focuses on technological transfer and industrial research on cutting-edge technology, in particular RFID - Radio Frequency Identification technology and computer vision in various industries particularly among mass consumption sectors, textiles, fashion, clothing and intelligent urban mobility and logistics.

<http://rfid.vislab.it/>

Fashion district for trade customers

Centergross (www.centergross.com) which is based in Bologna, is one of the main fashion trade hubs in the region. Spread over an area of 400,000 m² of commercial space and 100,000 m² of offices, it employs 6,000 people and consists of over **683 businesses, 70% of which are from the fashion sector**. The district serves businesses and traders from the industry who come from all over Italy and abroad: Europe, Asia, America and the Middle East. 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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