



THE SOUTHERN ITALY THAT INNOVATES AND PRODUCES.

THE TEXTILE, CLOTHING AND FOOTWEAR CHAIN

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28th, July 2015

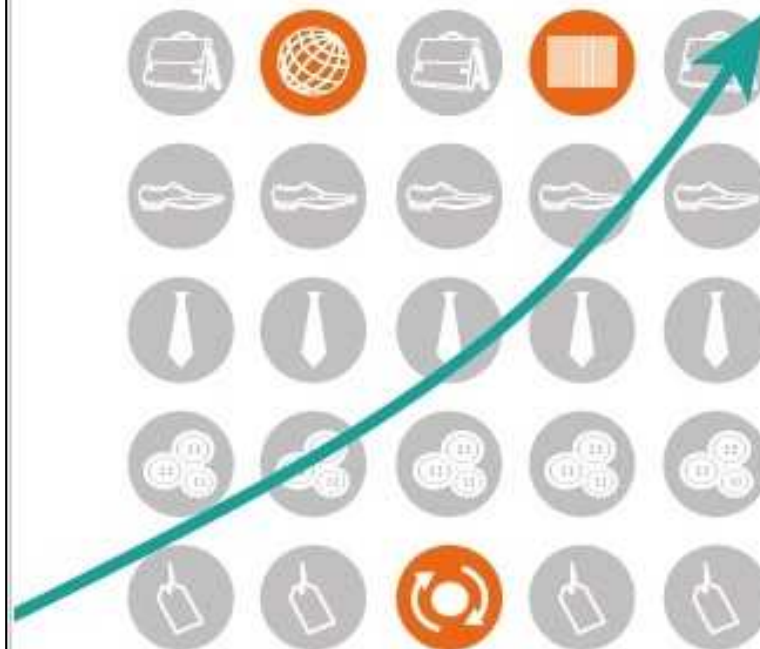
Agenda

- Research Objectives: *Southern Italy that innovates and produces*
- Italian Fashion industry: an European excellence.
- The Southern Italy that produces and contributes to Italian competitiveness in the world
- Some final remarks about the future

UN SUD CHE INNOVA E PRODUCE

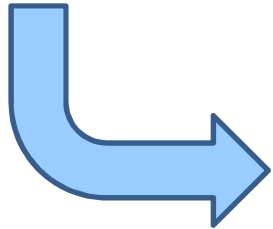
Volume 3

La filiera abbigliamento - moda

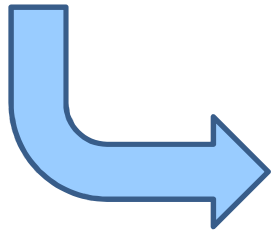


Aims of the research Survey.

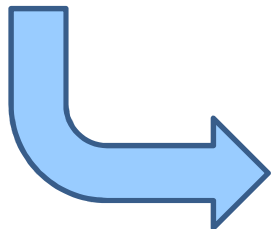
An in-depth analysis of the TCF chain in order to



Estimate the «weight» the sector has in Italy and in the Southern Italian Region, also by taking into account **the productive relations between the macro areas.**



Highlight the main competitiveness features (**innovation, internationalization, logistics and value of the Supply Chain**) starting from the present competitive scenario and pointing out strong and weak points



Analyzing the economic environment in which the sector develops itself pointing out the links **between companies, the “networks” and the existing districts and geographical interdependencies.**

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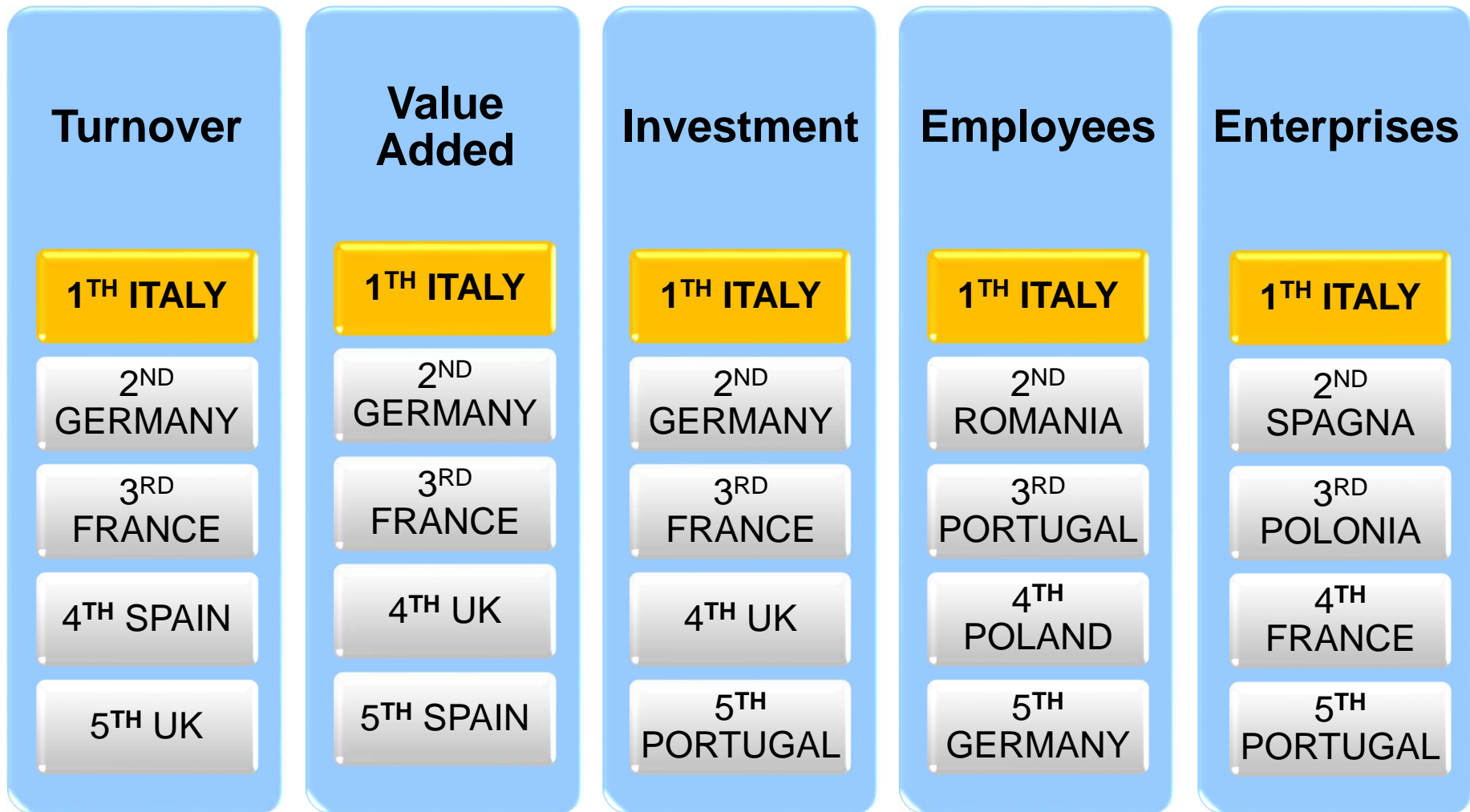
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The most relevant figures of Italian TCF industry



Source: SRM on Istat

The “soul” of the European Fashion industry is “very” Italian.



Yet Italy shows important structural differences with its competitors

	Average TCF Turnover (thousand euro)	Medium to large Enterprises (>50 employees)	TCF industry: % Medium to large enterprises on total	Average manufacturing turnover (thousand euro)
Germany	3,230	523	7	9,661
UK	1,420	278	3.6	5,078
France	1,257	339	2	4,109
Italy	1,232	1025	1.6	2,171
Spain	700	248	1.3	2,598

Source: SRM on Istat e Aida

Export of Italian TCF industry

- In spite of the small size of the company, the Italian chain is still able of giving value to its products, of gaining competitiveness on various markets and to successfully operate in “faraway markets”.

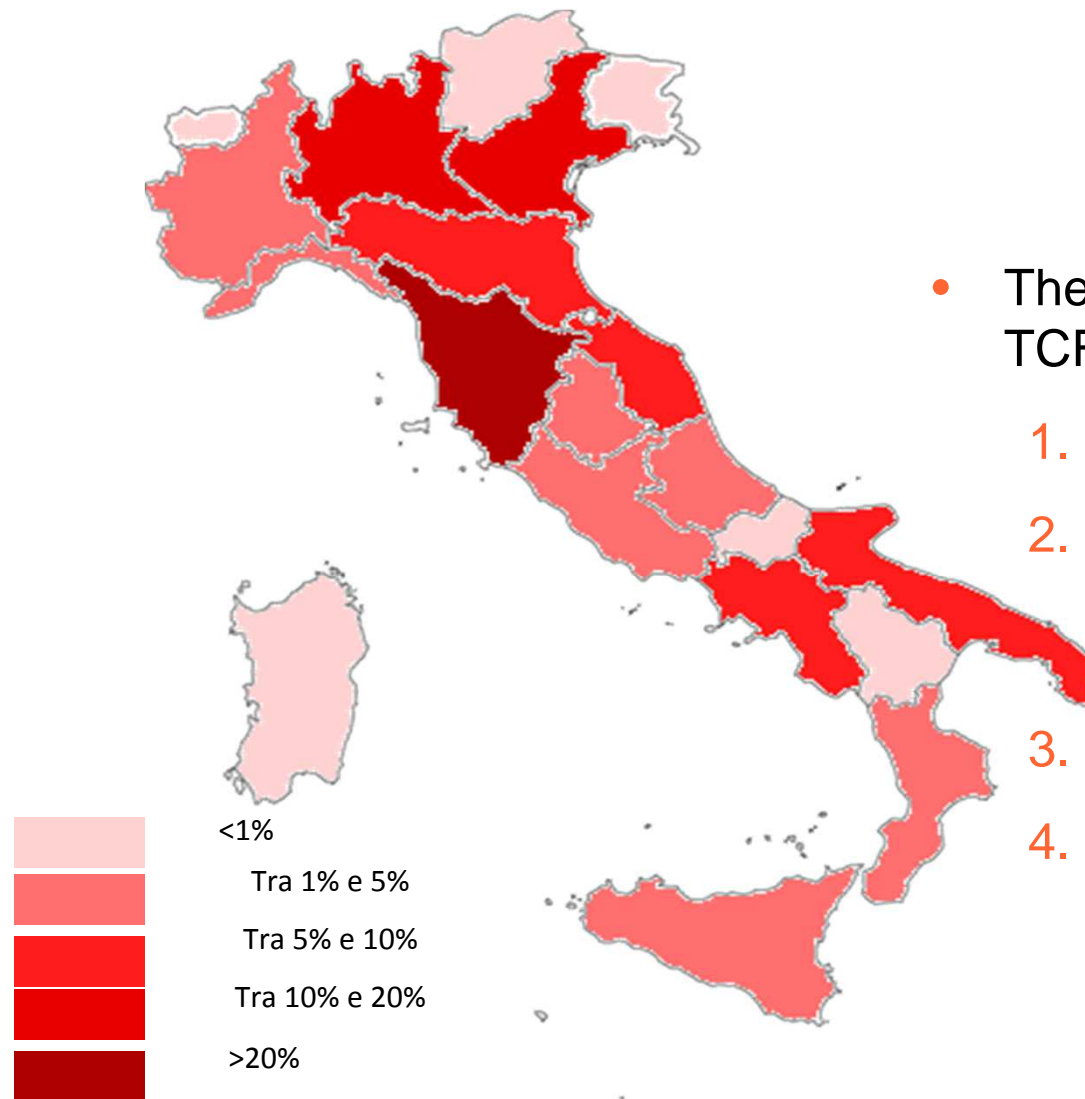
<u>TEXTILE</u>		<u>CLOTHING</u>		<u>FOOTWEAR</u>	
China	106,578	China	177,435	China	50,761
India	18,907	Italy	23,735	Italy	11,714
Germany	14,910	Bangladesh	23,501	Vietnam	8,722
USA	13,924	Hong Kong	21,937	Belgium	5,131
5th Italy	13,459	Germany	18,409	Germany	4,85
Turkey	12,157	Vietnam	17,230	Hong Kong	4,689
Korea	12,043	India	16,843	Indonesia	3,860
Hong Kong	10,718	Turkey	15,408	Netherland	3,461
Taipei	10,246	Spain	11,543	Spain	3,149
Pakistan	9,341	France	11,046	France	2,828
World	305,898	World	460,268	World	126,467

Source: SRM on WTO e UNComtrade

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TCF enterprises' distribution in Italy and in the Southern Italy

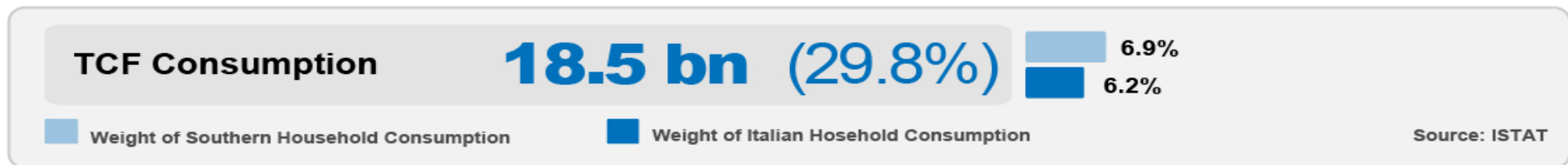
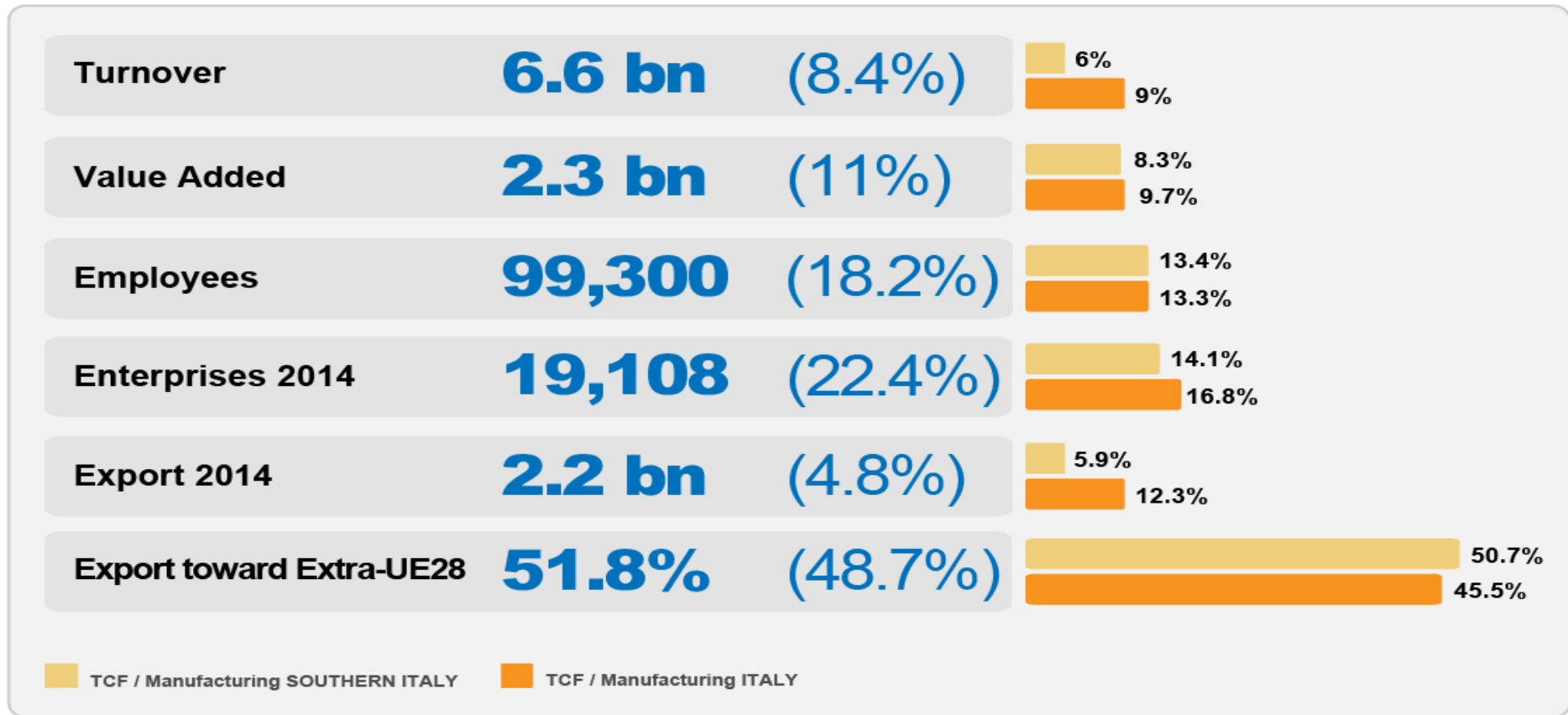


- The company system of Italian TCF amounts to:

1. 34,8% in the Centre
2. 22,4% in the Southern Italian Region (Campania, 9,5% and Puglia 5,6%)
3. 22% in the North-West
4. 20,8% in the North-East

Source: SRM on Movimprese

The most relevant figures of Southern Italy TCF industry



The structure of enterprises in the Southern Italy

	Enterprises		Employees		Average Dimension
	units	% manuf.	thousand	% manuf.	Employees /Enterprises
Southern	19,108	14.1%	99	13.4%	5.8
Italy	85,253	16.8%	546	13.4%	6.4

Source: Istat 2012- Movimprese 2014- Export Coeweb 2014

A “South” with its own specific production and distribution that strengthen the Italian market

Southern Italy TCF sector has 3 productive «souls»:

1

Companies investing on **high-quality** tailor-made production
They found their activity on the **excellence** of **craft tradition**

2

Companies investing on the **brand** and that, as such, independently from the place of production (Southern Italian Region, Italy, Abroad), rely on the **strength of the brand**, on **communication** and on **distributive logic**

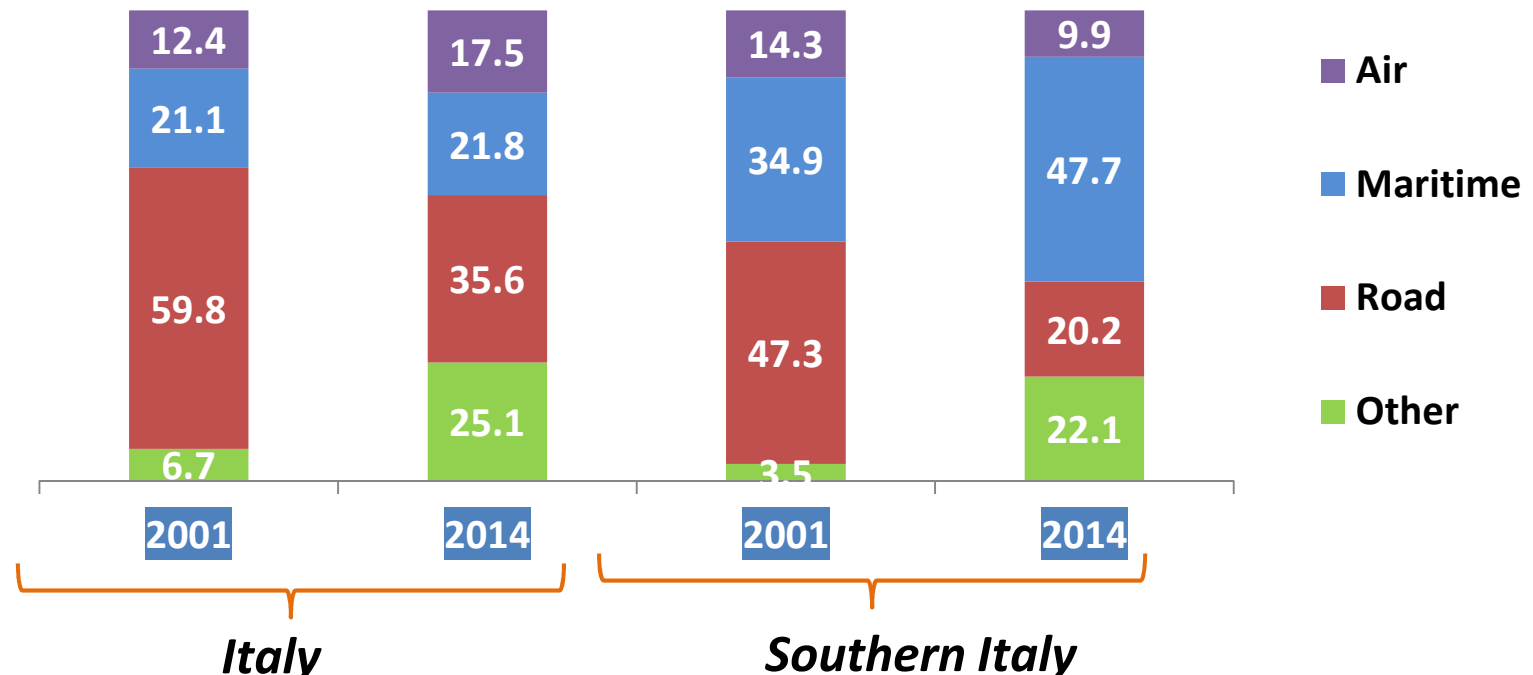
3

Companies that, for various reasons (importers of raw materials, converters of textiles, producers, distributors) are part of the productive chain, and are oriented toward the **national market** and **sub-contracting activities** for **foreign and North Italian companies**

The role of maritime logistic as of southern competitiveness driver

- The new productive and distributive trends of the TCF chain are expanding the competitive relevance of the logistics chain (the maritime one, in particular) within company processes.
- **In this context, the Southern Italian Region has an important role.**

Interexchange with the World by mode of transport



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Some final remarks : trajectories for growth

- TCF Industry is an important sector in national production and the "Southern" one represents an integrant and relevant part of the national value.
- To “properly dress the world” has always been, and always needs to be, the strategic imperative of the sector in Italy (and Southern Italy) to revamp and strengthen in the global market.

In this scenario, the two main interpretative trajectories (in particular for the Southern Italy) can be summed up into two concepts:

- **“Quality Trust”**: means having strong expectations in our capability of bringing the production of Southern Italy back on a better growth track, based on the strength of its entrepreneurial system. This should be a common goal for the whole Country; its companies, its institutions, the universities and the banks.
- **“Competitive Chain”**: means understanding that the Italian system is deeply interconnected with its inner components (South) and its international processes. So, no competitive challenge can be successful if the territorial and entrepreneurial systems will not network with each other and with the other players in the market.

Thanks for your attention

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