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THE KNITWEAR AND CLOTHING INDUSTRY IN EMILIA ROMAGNA
Productive models and structural changes

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Premiss

The volume deals with the structural and organizational transformation of the knitwear and clothing industry, through analysis of the case of Emilia-Romagna and the district of Carpi, Italy.

In the sectors of knitwear and clothing the Emilia region stands in third place in the national table by value of exports and number of those employed, while the district of Carpi, which accounts for one quarter of the regional production, represents one of the leading Italian industrial districts in the sector.

The theme of change takes its place in the processes of transformation that involve the textile/clothing sector in the advanced industrial countries.

Faced with the increased competition stemming from countries with low labour costs, European firms have reacted with a variety of strategies, including intense policies of productive delocalization aimed at recovering competitivity in the matter of prices, and policies of repositioning of the national industry on higher segments of the market, less subject to competition from products coming from the aforesaid low-wage countries.

The Italian knitwear and clothing industry and that of Emilia-Romagna in particular represent interesting cases of a productive system that has opted for the second strategy, i.e. tending to seek new competitive variables linked with the quality, style and innovation of the product, and thus retaining the centre of domestic production in Italy.

The analysis proposed in this paper aims to evidentiate the effects of these strategic choices on the structure and internal articulation of the sector.

The analysis featured in the volume is based on data and information taken from the Observatories of the textile/clothing sector, collected at national level, in Emilia-Romagna and in the district of Carpi, starting from the early 1990s, under the scientific management of Professor Sebastiano Brusco, who devised it and to whom the book is dedicated.

From the Observatory data the structural changes occurring in the Emilia knitwear and clothing industry and in the district of Carpi can be measured and the characteristics of the Emilia productive system can be compared with those of other important Italian textile regions, like Lombardy, Veneto, Tuscany, etc.

Identification of the types of firm, as regards both firms operating for the final market and those working in subcontracting, was performed with use of cluster analysis: applied to the statistically representative samples from the Observatories: this enabled precise description of the different types of firm and assessment of their importance and diffusion within the sector.

From the open interviews it was possible to understand in-depth the strategies followed by the Emilia firms through the 1990s (at the level of products, markets and distribution channels; whether in organization of production or productive delocalization); the reasons behind these strategic choices; and the effects produced on the organization and the internal competences within the firms.

1. The characteristics of the industry in Emilia

One specific feature of the Italian textile/clothing sector is the variety of the forms of organization found in the local productive systems in which the firms operate.

The survey performed at the start of the 1990s on nine regions of Italy through the National Observatory evidentiated how within the Italian knitwear and clothing industry there were different productive models, very well characterized at the territorial level (the Veneto model, the Tuscan model, the Puglia model as a variant of the Veneto one, etc.).

These organizational differences are typical of the manufacturing sectors characterized by a low standardization of product and process, and are closely connected with the social and cultural endowments and the heritage of competences of the individual territorial areas in which the firms are concentrated.

Emilia-Romagna, too, represents an interesting instance of the coexistence of different productive models, very well characterized at territorial level.

On the one hand, we find medium-large firms, with prestige brands recognized by consumers[1], located mainly in the provinces of Reggio Emilia, Bologna and Rimini/Forlì[2].

On the other, there is a strong concentration of employment in the province of Modena (equal to 40% of the total employment in the region), whose productive structure is influenced by the district of Carpi, which specializes in the production of knitwear and mainly consists of small and medium enterprises.

In this district many firms work with brands that are not visible on the market, or with the brand of the distribution channel, and even the firms that have brands recognized by consumers[3] tend to be of smaller size than the regional average.

The district of Carpi is characterized by having a low degree of concentration of production, even smaller than that recorded at the start of the 1990s, whereas the rest of the sector in Emilia features a much higher degree of concentration.

2. The trends detected in the regional industry

During the course of the 1990s, the Emilia knitwear and clothing firms belonging to these two different productive systems followed a similar direction of change.

The main trends were:

2.1 *diversification of the areas of productive delocalization;*
2.2 *positioning on medium-high segments of the market;*
2.3 *growth of exports and experiment with new distribution channels.*

While the direction of change was similar for these two productive systems, they pursued different modes of organization and recorded different performances, inasmuch as these were closely connected with the differences of structure and marketing positioning of the firms belonging to these two different productive systems.

The medium-large firms that, already at the start of the 1990s, were characterized by a strong image that was recognized by the final consumer and by an ability to control the distribution of their own production, showed greater capacity for competition, which took the form of an increased volume of business and a greater weight achieved within the regional knitwear and clothing industry.

[1] Max Mara, Mariella Burani and Maska at Reggio Emilia; Les Copains and La Perla at Bologna; Alberta Ferretti (Aeffe) and Iceberg (Gilmar) at Rimini.
[2] The proportions of employees in textile/clothing in these provinces with respect to the regional totale are the following: Reggio Emilia 15.6%, Bologna 15%, Forlì/Rimini 11.4%.
[3] Blumarine, Liu Jo, Avirex.

The district of Carpi and the small firms operating for the final market, on the contrary, underwent a serious weeding-out that led to an overall drop in the turnover of the district and a loss of importance within the regional sector.

At the start of the 1990s, the district of Carpi started out from a lower market positioning, as compared with the regional average, and from a structure of firms that were unable to control the distribution of their own products.

By analyzing the individual trends listed above, it is possible to get a better understanding of the strategies pursued by the firms of this region.

2.1 *The diversification of the areas of productive delocalization*

The productive system in Emilia has always been open to the outside world — much more open than, for instance, that of the Veneto[4].

In the 1970s, the Emilian firms decentralized their production to areas where female labour was more available and the cost of labour was lower: these areas were the neighbouring ones of the province of Mantua in Lombardy and the province of Rovigo in the Veneto.

In the course of the 1980s, partly by reason of cost but above all because of the difficulty of finding workforce on the regional labour market, the Emilian firms experimented with new areas of delocalization, mainly the regions of the Centre-South and, to a lesser extent, foreign countries.

This decade witnessed the most significant shifts of production towards the regions of the Adriatic backbone (Marche, Abruzzo, Puglia, etc.), during which the larger Emilian firms selected subcontracting firms in order to establish steady and durable relations with them.

The trend towards internationalization of production manifested mainly during the 1990s and, although involving both Emilia as a whole and the district of Carpi, featured rates of growth below the national average, and levels lower than those of the Veneto industry, which commenced delocalization later than Emilia, only in the 1990s, and showed preference for the countries of Eastern Europe.

The Emilia knitwear and clothing industry is thus characterized:

- by delocalizing greatly outside the regional boundaries, more than half of the production outsourced;
- but by keeping the centre of production in Italy, with close links with the subcontractors in the regions of the Centre-South (44% remainder of Italy, of which 22% Centre-South);

[4] In 1993 among the main clothing regions, Emilia decentralized 53% of production outside its borders, as compared with 49% for Lombardy and 31% for the Veneto and Tuscany.

- and thus by having a low degree of internationalization of production (12%).

There is more than one reason underlying the decision to maintain production prevalently in Italy.

A first reason, referring in particular to the larger firms, can be retraced to the decisions to delocalize implemented during the 1980s, which privileged the regions of the Centre-South. To deinvest in Italy, in order to train subcontractors abroad with an equal degree of skill, would have been an expensive strategy, placing in jeopardy the achieved quality of the product.

A second reason — though not second in importance but, indeed, of a more general character — lies in the specialization of the Emilian output. Emilia produces mainly female apparel, featuring a high fashion content and a positioning in the medium-high segments of the market. The production is very variable in time and is performed, on average, in short runs. In many cases, its characteristics make it inconvenient to seek partners who are geographically distant, and difficult to pursue a policy aiming exclusively at containing production costs.

A third element has recently influenced the decision of the Emilian firms to delocalize the production: this is the establishment of Chinese workshops in the provinces of Modena and Reggio Emilia, specializing in the more labour-intensive production stages (sewing, ironing, etc.).

This phenomenon began to appear towards the end of the 1990s. In the district of Carpi the reliance on the Chinese workshops had direct effects on the policies of productive delocalization. More recently, production stages have returned to the district, and to neighbouring areas, at the expense mainly of production that had been delocalized to the South, but also, to some extent, those subcontracted abroad.

The knitwear and clothing industry in Emilia-Romagna, then, offers elements of great interest relating to the debate on the internationalization of production.

The range of alternatives exploited by the region's industry helps to confirm the hypothesis that delocalization of production abroad is not the only path that available to the knitwear and clothing industry in the industrialized countries in order to recover competitiveness and retain market shares.

2.2 *Positioning in the medium-high segments of the market*

The strategies pursued by the Emilian firms have witnessed a gradual, continuous rise in the quality of the product (in terms not only of intrinsic quality, but also of style and fashion content) and this has enabled an overall repositioning of the sector on higher market bands.

The interesting point is that the process of qualification of the product has involved the firms in a general way, both the small and the larger ones.

In particular, it has characterized the district of Carpi, which started out in the early 1990s from a lower market positioning with respect to the regional average.
The investment made by firms in the stage of devising and designing their products has led not only to increased quality of production but also a significantly wider range of products offered.

In the 1990s the variety of the products and their variability notably increased, and this represents one of the main strong points of the industry in Emilia and is one of the reasons underlying the success of the products on the foreign markets.

The annual sample range of the Emilian knitwear and clothing industry almost doubled during the decade, from 237,000 to 425,000 models.

The increase in the number of models and the greater differentiation in the production range has brought about a decrease in the production runs in the industry of the region as a whole.

During the 1990s the typical features of the Emilian production, represented by the creation of female items with high fashion content, high quality and in short production runs, became further accentuated, testifying to a specific vocation of the regional industry towards products representative of the best *Made in Italy* production and *Italian style.*

Confirmation of the positioning of the sector comes from the analysis of the mean prices of the exports of knitwear and clothing. Emilia has the highest mean prices, whether in comparison with Lombardy, Veneto or Tuscany[5], yet in spite of that, during the 1990s, it recorded an increase in exports greater than the national average and greater than the aforesaid regions.

[5] Setting the mean price at 100 per kilogram of Italian export, Emilian knitwear is sold at 174, as against 139 for the Marche, 125 for the Veneto and 84 for Lombardy and Tuscany. In the case of clothing, the differentials are even greater. Again with 100 as base for the Italian average, Emilia sells at 250, Piedmont at 218, Lombardy at 136 and Veneto at 116.

Emilia-Romagna increased its share of the value of Italian exports of knitwear and clothing 12% in 1990 to 15% in 2001[6], rising from fourth to third place in the regions for amount of Italian exports of these products.

In the course of the 1990s the strategy followed by the firms aimed to shift the competition front to variables other than cost, such as quality, innovation and differentiation of output, and this enabled excellent performances to be achieved on the foreign markets.

In like manner, although the decision of the industry to position itself on higher market segments caused a contraction of the productive base, it was accompanied by a drop in employment in line with that of other regions of the North, so that Emilia-Romagna remained in third place in the sector for employment, after Lombardy and the Veneto.

2.3 The growth of exports and the experimentation with new distribution channels

The growth of exports, and of the propensity to export, is a general trend that involves small, medium and large firms.

Within the sector there are, however, some differences mainly regarding the intensity of the phenomenon.

Through the 1990s, the firms in the district of Carpi and in the province of Modena recorded export growth rates that were systematically lower than the regional average, while the best performances came from the medium-large firms mainly located in other areas of the region.

The data referring to regional exports distinguished by province are especially significant. Although Modena remained the top Emilian province by value of knitwear and clothing exports, its importance as against the regional figure fell from 49% in 1990 to 30% in 2001, whereas Reggio Emilia (from 19% to 27%), Florlì/Rimini (from 10% to 17%) and Bologna (from 16% to 18%) increased their share and were also responsible for driving up the growth of Emilian exports as a proportion of the national total.

The greatest growth of exports thus featured the medium-large firms as protagonists, these firms operating through brands recognized by the consumer and possessing high bargaining power with regard to the distribution system.

In the district of Carpi and the area of Modena, on the contrary, many of the firms of the district have a hard time imposing their brand on the market (even though they create high-quality products with a large fashion content); and they

[6] In the same period the share of national export of knitwear and clothing of Lombardy and Tuscany fell, while that of the Veneto rose by a mere one percentage point.

have difficulty in consolidating stable relations with the foreign distribution and, likewise, in entering new markets abroad.

And it is precisely because of these difficulties that the growth of exports of the district and the Modena area was slower than the regional and national averages, and not sufficient to counterbalance the fall in sales recorded on the domestic market.

During the 1990s, the Emilian firms also experimented with new distribution channels and new forms of collaboration with the distributors.

The firms characterized by prestige brands, recognized by customers, potentiated their networks of own shops and franchise shops, increasing their control over the distribution of their own products, but without abandoning the traditional channels represented by the independent shops that operate as exclusive distributors.

In the meantime, the medium and small firms were experimenting with new relationships with large foreign distribution chains. This type of client turns to the Emilian firms, not so much in order to find low-priced products, as to purchase quality items, with fashion content, produced also in short runs.

Large foreign distribution, more diversified and working in higher market bands than its Italian counterpart, is interested in the ideas and new products that the regional firms are able to offer, but in the bargaining relation with the producer the large distributors tend to impose their own brands and insist that production costs be kept strongly in check.

However, the majority of the regional firms do not work for the large distributors, preferring the relationship with retailing, both traditional and organized; but it is indeed the smaller firms that have more intense relations with the large distributors, when they operate on the foreign markets.

As regards the distribution channels and the relations between producers and distributors, the 1990s were a period of change and of interesting experiments by the Emilian knitwear and clothing industry.

The relations between producers and distributors remained, however, the most complex and problematic aspect of these years; and one that, in perspective, will need to be addressed with further commitment in order to find new ways of collaboration and alliance.

Through greater integration with the distribution, even the small and medium producers might recover their profitability, thus avoiding the excessive downward pressure on the profit margins caused by the increasing bargaining power of the distribution system.

3. Problems and prospects in the sector

The picture of the knitwear and clothing industry in Emilia-Romagna that emerges from the changes that occurred during the 1990s is a variegated one, of light and shade, characterized by the simultaneous presence of dynamic and innovative aspects and signs of difficulty.

In a market context with much competition, both domestic and international, the Emilian firms have been able to improve the competitivity of their products and to increase the sales destined for foreign markets, while maintaining production for the most part in Italy.

The existence of less positive performances in a district as important as that of Carpi does, however, evoke certain topics of the more general debate regarding the prospects and future of the industrial districts.

As we have seen, there are reasons, both sectorial and structural, that account for the different performance of this district compared to the rest of the region, even though pessimists predict an unavoidable decline of this productive system in the face of the so-called globalization of the markets.

In Emilia, the growth of the larger firms and the takeovers they operate (including in the footwear sector) have brought about an increased degree of concentration of the sector, but this trend has not produced any structural alteration in the set-up of the regional industry.

The independent firms continue to be the large majority, and the medium and small ones (though their size is increasing) represent ninety per cent of the regional firms and seventy per cent of the employment.

If we consider the employment proportion of the medium-large final firms, characterized by brands recognized by customers, it can be seen that they account, directly or indirectly, for a minority share of those employed in the regional sector.

These firms provide employment within the region for a little over 15,000 persons out of 45,000, equal to 32% of the total employed (over 9,000 of this in the same medium-large final firms and 5,000 in the regional subcontractors that work for these firms).

This stems from the fact that these firms outsource the majority of their production to subcontractors located outside Emilia-Romagna.

The small firms that work for the final market, on the other hand, employ, directly or indirectly, over 30,000 persons, 68% of those employed in the sector (12,000 of them in the small final firms and 19,000 in the regional subcontractors linked with them).

For, the majority of those employed by the subcontracting firms in Emilia-Romagna (80%) work for the small final firms, which are the firms that outsource production to the greatest extent within the boundaries of the region.

If in Emilia-Romagna the small final firms are entering a critical situation, the same is true of the majority of the regional subcontractors — and thus for a productive system that, overall, guarantees more than two thirds of the jobs existing in the knitwear and clothing industry in Emilia.

If we exclude the leading firms in the sector, the weak elements in the regional industry and, in particular, in the district of Carpi, can be found in the limited capacity of <u>individual firms</u> to:

- exploit the products created by them;
- promote themselves on new markets abroad;
- establish forms of alliance with the distribution system.

The relations between producers and distributors are one of the most problematic aspects and are fundamental critical nodes for the future prospects of the small and medium producers.

In devising suitable policies for intervention, however, one should not lose sight of the many *strong points* in the knitwear and clothing industry in Emilia.

These can be identified in the ability to:

- devise and create ever new products, in line with the trends in fashion;
- ensure a high product quality;
- offer a very wide range of models;
- guarantee very quick times of response.

These aspects are underpinned by the widespread capacity for creativity and innovation that is a feature of the final firms of the region, but also by the technical-productive know-how that has its roots in the local subcontracting firms.

It is, after all, through the cooperation between these two types of firm that the Emilian knitwear and clothing industry has built up its capacity for competition and maintained it over time.

And the same cooperation underlies the achievement through time of the so-called *Made in Italy* and *Italian style.*

Perhaps for the output underpinned by strong industrial brands or designer names the localization of the production may not be of special importance for the final consumer: the guarantee of quality is provided by the firm's brand and image.

In the case of a great many small firms, the fact of the dead centre of production being in Italy and their strong local rootedness, if combined with a high quality and style of the product, may become a real competitive advantage, appreciated even by the final consumer.

The production of apparel in Emilia-Romagna belongs in the definitions of *Made in Italy* and *fully Made in Italy* as set out in the proposals to set up brands for the protection and valorization of Italian products.

The small and medium firms operating for the final markets and the entire productive chains linked to them could draw advantage from the institution of these brands and their certification, as they also could from the adoption of social label and of respect for the environment.

To be sure, the characteristics, the dynamics and the prospects of the knitwear and clothing industry do not call up the often stereotyped image associated with this sector with the definitions of mature, traditional or declining industry.

Just like other manufacturing sectors, the sector is characterized by a close interweave between innovation and tradition; between image, style and craftsmanly skill; between global market and local productive system.

In view of the growing international competition that surrounds the knitwear and clothing industry, the importance it assumes in the economy of Emilia-Romagna, and the role played by this industry in maintaining the levels of female employment in the regional labour market, the Institutions need to pay closer attention towards the sector: in particular, they need to devise a strategy aimed at valorizing the local productive system, based on intervention to support the commercial internationalization of the firms (not only their productive internationalization) and the training and updating of the key competences for the sector (design, marketing, branding, distribution, etc.).

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