



 Sviluppo Campania

FSC Fondo per lo Sviluppo
e la Coesione



**Textile clothing footwear
and goldsmith**



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TEXTILE CLOTHING FOOTWEAR AND GOLDSMITH SECTOR IN CAMPANIA





Creativity, quality and artisanship, combined with a centuries-old tradition. The textile-clothing-footwear sector (TAC) in Campania represents an important sector in the regional manufacturing panorama. During 2022 there were solid signs of recovery, as highlighted by Confindustria data.



The gold-silver sector, boasting a very long tradition, has a core business focused on the quality of jewellery, exclusive design, the creative ability of artisans, and product and process innovation, which represent the strengths of Campania's goldsmiths around the world. The beauty of Campania's craftsmanship continues with cameo and coral work: the Neapolitan school holds the record for the most advanced processing techniques and for the excellence of its artefacts.



In addition to the textile-clothing-footwear industry in the strict sense, it is important considering the goldsmith, cosmetics, accessories sectors (including glasses and watches), and productions related to the supply chain (candles, mannequins, glasses cases, flowers, etc.).





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ENTERPRISES



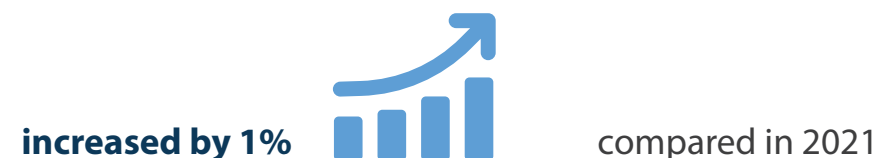


Tab. 1 – Distribution of enterprises. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Years 2019-2021

Year	2019	2020	2021
Total	8,999	9,090	9,080

Source: data Infocamere 2021

More than **9,000 enterprises** are located in Campania, the 9% of the sector's enterprises located in Italy. The number of enterprises operating in the **textile-clothing-footwear and goldsmith sectors**.



More than half (4,895) of the enterprises in Campania operate in the manufacture of clothing articles, followed by enterprises in the manufacture of leather and similar articles (2,057 enterprises) followed by jewellery and glasses production.

The production chain starts from ready-made textiles, mainly for third parties, projecting onto both wholesale and retail distribution.

The enterprises are mostly micro and small. This characteristic is balanced by a strong interrelation that guarantees a high capacity in innovation and, therefore, competitiveness on the markets. The interrelation strengthened by the link with the territory sees the supply chain develop locally, often in the form of districts.



Distribution by class of employees and value of production

With respect to company size, which we see shown below in Tables 2 and 3 and Figs. 1 and 2 (distribution by class of employees and value of production), the numbers concerning the textile-clothing-footwear and Goldsmith sectors in the Campania region sees a clear prevalence of MPMEs (Micro/Small and Medium Enterprises).

The absolute majority (86%) of the companies belonging to the sector are micro, with less than 10 employees, for activities that evidently still retain an important craftsmanship characterisation, which allows possible investors to find a favourable environment for their activities in the area, with a large induced production allowing the outsourcing of numerous complementary activities, carried out flexibly and quickly.



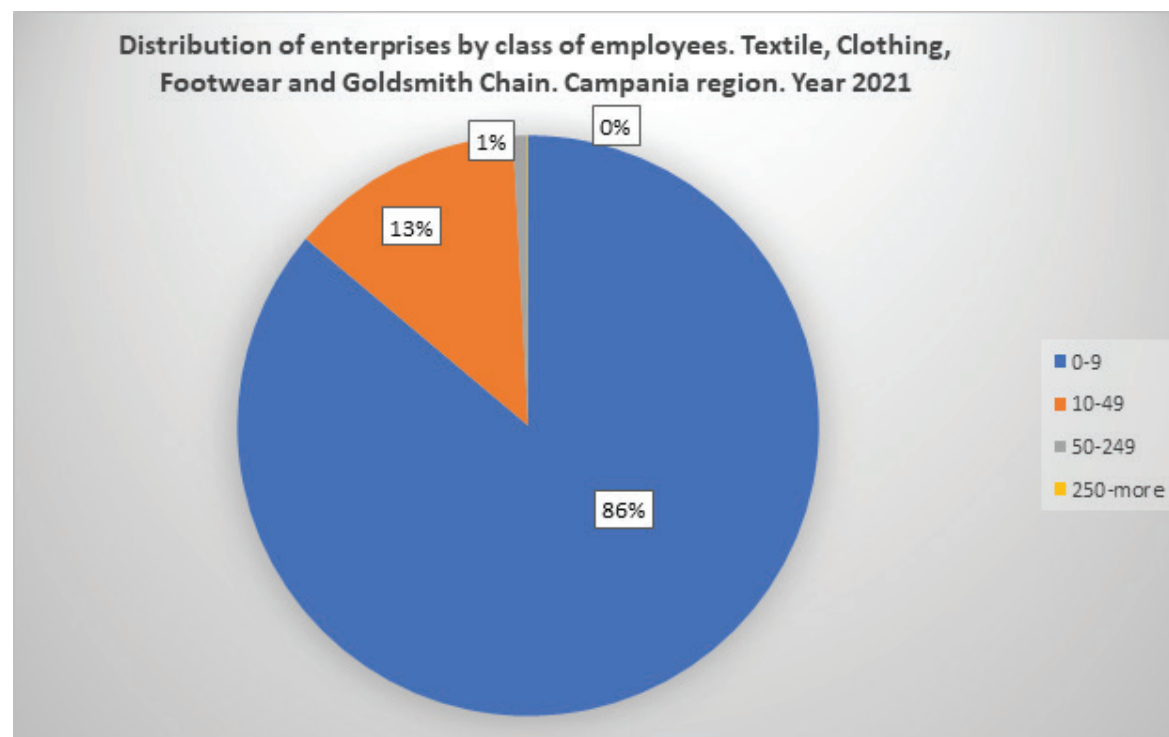


Tab. 2 – Distribution of enterprises by class¹ of employees. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021

Class of Employees	Micro 0-9	Small 10-49	Medium 50-249	Large 250 - oltre	Total companies
Total for class	7,821	1,183	72	4	9,080

Source: data Infocamere 2021

Fig. 1 - Distribution of enterprises by class¹ of employees. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021



Source: data Infocamere 2021

¹ EU MPMI classification



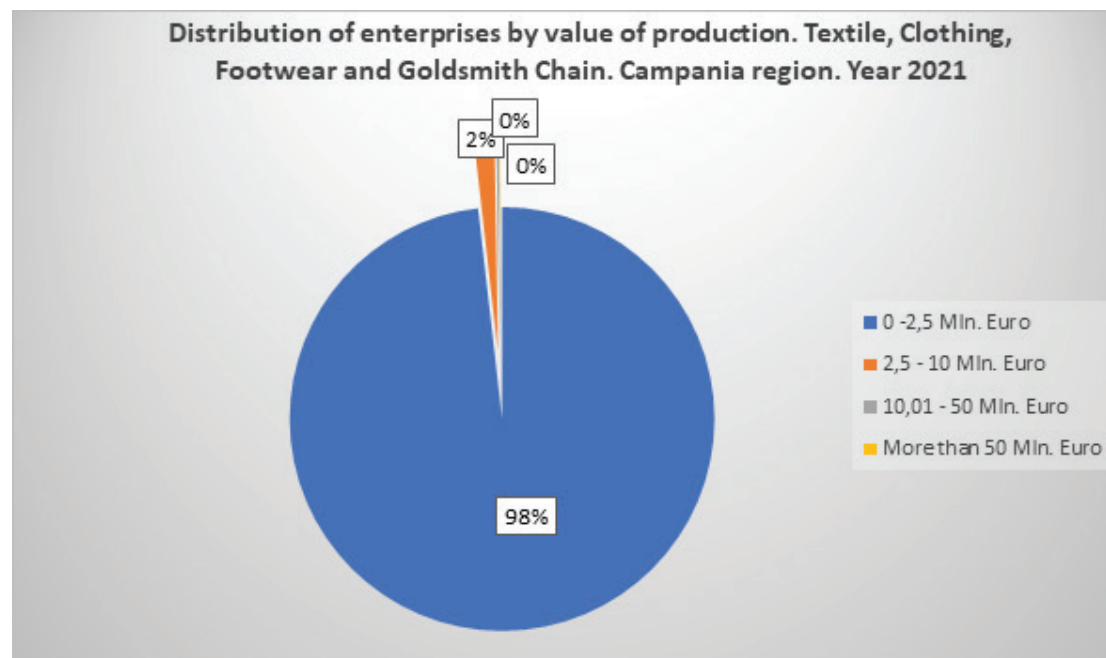


Tab. 3 - Distribution of enterprises by value of production. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021

0 - 2,5 Mln. Euro	2,5 – 10 Mln. Euro	10,01 - 50 Mln. Euro	Oltre 50 mln. Euro	Total
8,916	140	20	4	9,080

Source: data Infocamere 2021

Fig. 2 - Distribution of enterprises by value of production. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021

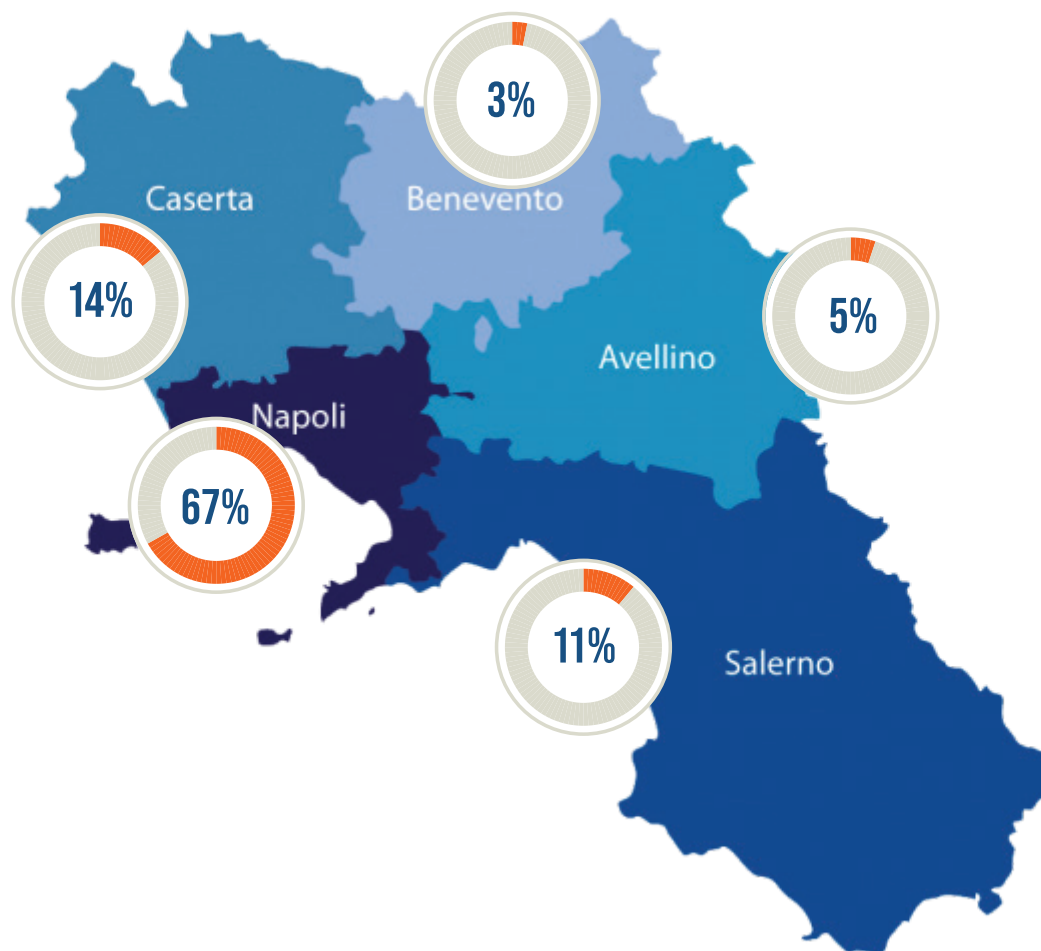


Source: data Infocamere 2021



Distribution by province

As shown in the table and figure below, the greatest concentration of enterprises in the sector is located in the province of Naples and Caserta, with the 67% and 14% respectively. Salerno (11%), Avellino (5%) and Benevento (3%).



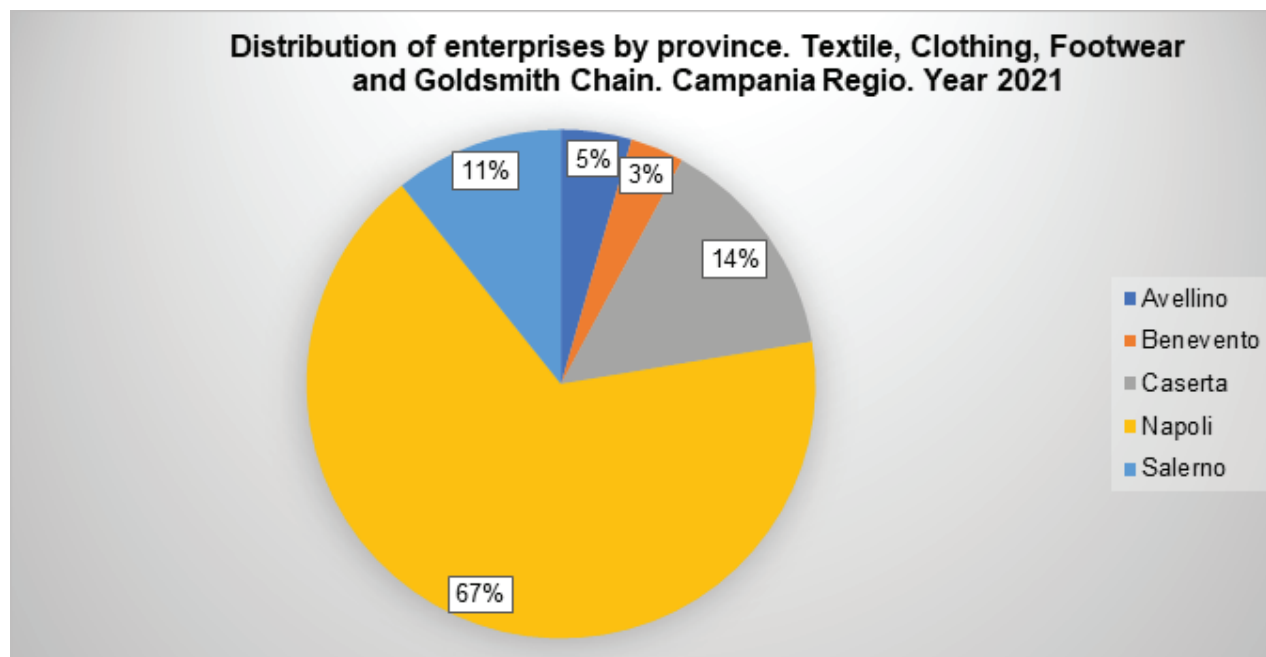


Tab. 4 - Distribution of enterprises by province. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021.

Avellino	Benevento	Caserta	Napoli	Salerno	Total
406	311	1,312	6,073	978	9,080

Source: data Infocamere 2021

Fig. 3 - Distribution of enterprises by province. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Year 2021



Source: data Infocamere 2021





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CONSORTIUMS



TARÌ (Marcianise)

Figures: operational since 1996, Tarì has 400 companies permanently present (30% production, 30% services, 40% distribution), 2500 employees, 400,000 presences per year, 3 dedicated events for the sector per year with over 18,000 presences and the participation of 80 guest companies. It has a consolidated annual turnover for 850 million Euro. 30% of the companies' product destined for export (mainly European and Mediterranean countries, USA, China). Tarì has a dimension of 135,000 sq.m., with more than 40,000 sq.m. permanently dedicated to the production and distribution activities of the members, plus 9,500 sq.m. of exhibition halls (each of 4,000 sq.m.).



OROMARE (Marcianise)

Operational since 1998, it groups together about 200 companies in the jewellery, gold and coral sectors, with a strong craftsmanship vocation. It represents the excellence of Campania's goldsmith art, creating a network of artisan and animating the dualism that has always characterised companies operating in the sector, balanced between advanced technology mass reproduction techniques and the enhancement of manual skills.



ANTICO BORGO OREFICI

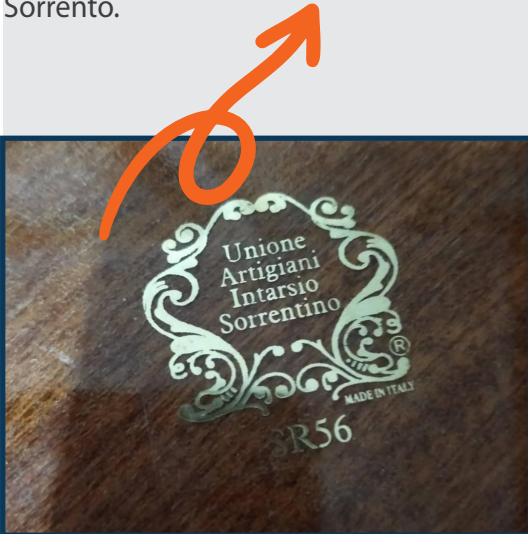
Established in 2000 to create a network of companies operating in the Pendino district, known since the Middle Ages for its goldsmithing and jewellery activities, with the aim also of enhancing the area through urban redevelopment and the commercial relaunch. It is a training hub recognised by Campania Region, it plans and implements training activities for young people and adults, aimed at business creation and job placement.





SORRENTO INLAY CRAFTSMEN

The organisation was established with the aim of promoting and developing marquetry and cabinet-making in Sorrento.



SAN LEUCIO SILK

The brand was created to facilitate the growth and development of the textile sector and to protect, enhance and guarantee the quality and originality of local products and promote them internationally.





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LOCATION ADVANTAGES



In Campania's textile-clothing-footwear sector, the concentration of companies has led to the creation of industrial hubs specialised in various productions thanks to the long tradition that the provinces boast in the various sectors. In particular:

MODEC

It is the fashion and design brand of Campania. It is the result of a synergy between university, research and enterprises. Six universities in Campania have made their expertise available to support the region in creating an integrated fashion production and cultural system. This is a tool to support small and medium-sized companies in the region.

The companies transfer the required skills and know-how to the schools and training institutions with the aim of creating professional figures for fashion sector.

The aim is to create young professionals, enhancing creative figures to keep the manufacturing tradition of Campania.

TANNING POLE OF SOLOFRA

The tanning pole of Solofra covers an area of approximately 115 square kilometres in the south-west of the province of Avellino. The companies in the area - around 400 tanneries, subcontractors and garment manufacturers - are specialised in the tanning of sheep and goat skins; around 4,000 people are employed in production and the annual turnover of the sector is over 1.5 billion euro.

The 'Distretto di Solofra' brand is a great success among foreign operators as guarantee of quality: it is the only one, among other things, to have obtained the prestigious eco-compatibility recognition.



FOOTWEAR DISTRICT OF GRUMO NEVANO-AVERSA

The Grumo Nevano-Aversa district comprises the provinces of Naples and Caserta. The footwear district is mainly concentrated in the so-called 'citadel of Aversa'. Today, it covers an area of 158.24 square kilometres and has a population of about 450,000 inhabitants.

Within the district, there are different industrial vocations: the first is located in Aversa area and it is characterised by the production of footwear, while the second, which belongs to the Grumo Nevano area, produces goods related to the textile-clothing sector.

TEXTILE DISTRICT OF SAN GIUSEPPE VESUVIANO

Recognised by the Campania Region in 1997, it is the largest textile district in the South of Italy; it covers an area of 109 square kilometres where a production organisation has developed based on a chain of SMEs capable of implementing all the phases of the production process.

The main types of enterprise in the area can be classified as: fabric diffuser/converter/producer; clothing production enterprise; clothing and personal linen wholesale enterprise; façonier; sub-supplier enterprises; itinerant trade enterprises; accessories diffuser and producer; enterprise providing services to companies such as trucking, advertising, packaging, shipping, etc.



TEXTILE INDUSTRIAL DISTRICT OF SANT'AGATA DEI GOTI - CASAPULLA

Located in the central part of Campania, in a hilly area close to the Taburno Regional Park, the Sant'Agata dei Goti-Casapulla textile district (in the provinces of Benevento and Caserta, respectively) specialized itself in the textile-clothing sector and in the clothing manufacturing sector on behalf of third-party companies or through the *façon* system (production linked to important Italian fashion brands).

Processing carried out in the province of Caserta is concentrated on silk and characterised by a high quality that allows penetration into foreign markets. In the Benevento area, activities are more in the field of mechanical and engineering production.

INDUSTRIAL DISTRICT OF SAN MARCO DEI CAVOTI (BENEVENTO)

The industrial district of San Marco dei Cavoti was identified by a resolution of 2 June 1997 of the Campania Region and, in addition to textiles, also includes other productions, such as the confectionery industry, thus having characteristics that differentiate it from other districts.

As far as textiles are concerned, the prevalent production is concentrated on outerwear (45% of enterprises), trousers (30%) and knitwear (14%).



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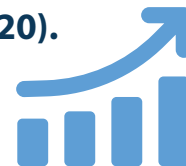
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IMPORT/EXPORT CHAIN. TEXTILE, CLOTHING, FOOTWEAR AND GOLDSMITH CHAIN. CAMPANIA REGION





The value of exports in 2021 for Textile, Clothing, Footwear and Goldsmith sectors is 935 million Euros,
(+13.8% compared to 2020).



More than **40%** of the export is related to clothing.
 An important contribution on international markets export also comes from tanned leather; travel goods, handbags, leather goods and saddlery; dyed furs, with the **19.9%** of total value and footwear (**18.3%**).



Tab. 5 – Import-Export Value. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Years 2017 – 2021

Chain TAC e Orafo	IMPORT					TREND IMPORT 2020-21	EXPORT					TREND EXPORT 2020-21	BALANCE IMPORT/EXPORT 2021
	2017	2018	2019	2020	2021		2017	2018	2019	2020	2021		
TOTAL	1.974.935.375	1.948.548.407	1.733.818.364	1.452.652.700	1.554.883.153	▲	1.131.953.947	1.334.861.536	1.182.397.063	821.646.197	934.821.666	▲	-430.061.467

Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021





Fig. 4 – Import-Export Value. Textile, Clothing, Footwear and Goldsmith Chain. Campania region. Years 2017 – 2021



Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021





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INCENTIVES AND FINANCING²



² "Source: [incentivi.gov.it](https://www.incentivi.gov.it) / [mise.gov.it](https://www.mise.gov.it) / [invitalia.it](https://www.invitalia.it) - febbraio 2023"





GREEN NEW DEAL

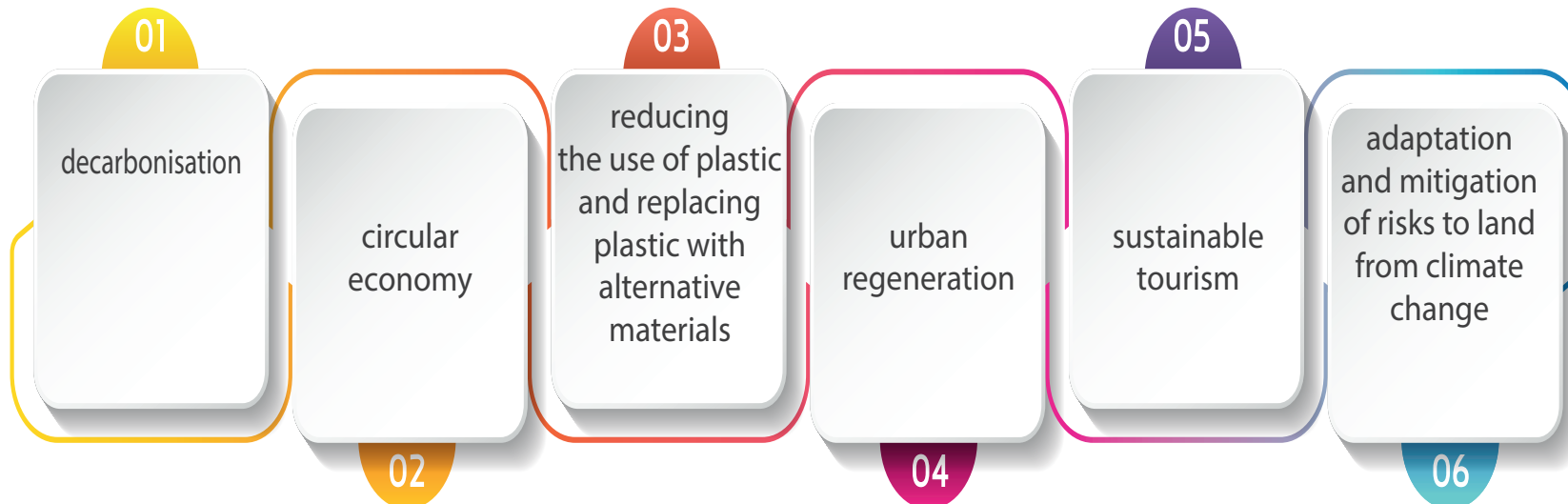


Research, development and innovation projects for the ecological and circular transition as requested by Italian Green New Deal.

The intervention provides for the granting of financial subsidies to support research, development and innovation projects for the ecological and circular transition.

It is addressed to enterprises of any dimension engaged in industrial, agro-industrial, craft, industrial services, and research centres, submitting projects individually or jointly.

The intervention supports projects related to Italian Green New Deal:





ITALY SOCIAL ECONOMY



Promotes the dissemination and strengthening of the social economy, supporting the birth and growth of enterprises operating, throughout the national territory, in pursuit of worthy general interests and socially useful purposes, with the granting of a loan of up to 15 years at a subsidised rate.

IPCEI FUND - MAJOR PROJECTS OF COMMON EUROPEAN INTEREST



Supports the implementation of large-scale industrial partnership initiatives, which bring together knowledge, skills, financial resources and economic actors from countries of at least two EU Member States. The partnership must achieve targets of radical innovation and high technological and production relevance, along strategic European value chains.





CONNECTIVITY VOUCHER - ENTERPRISES



The measure provides a connectivity voucher for high-speed internet providers. This is an important opportunity for the digitalisation of Italy's productivity, within the overall framework of the Government's actions to relaunch the economy.

NEW SABATINI - CAPITAL GOODS



Supports investments to purchase or lease machinery, equipment, plant, capital goods for productive use and hardware, as well as software and digital technologies.

ENTERPRISE PROTECTION FUND



The Fund acquires minority shareholdings in the risk capital of companies in economic-financial difficulty that propose a plan to ensure business continuity and safeguard of jobs. It also finances restructuring programmes through business transfers.





DIGITAL TRANSFORMATION



Supports the technological and digital transformation of the production processes of micro, small and medium-sized enterprises through projects aimed at implementing the enabling technologies identified in the Impresa 4.0 National Plan as well as other technologies related to digital technological solutions in the supply chain.

FCS-SUSTAINABLE GROWTH FUND FOR R&D AND CIRCULAR ECONOMY



Supports research, development and experimentation of innovative solutions for the sustainable use of resources, promoting the reconversion of production activities towards a circular economy model in which the value of products, materials and resources is maintained as long as possible, and the production of waste is minimised.

CIRCULAR ECONOMY



Incentive to encourage the conversion of production activities towards an economy model in which the value of products, materials and resources is maintained as long as possible, and waste production is minimised.





TRAINING 4.0 TAX CREDIT



Tax credit to support companies in the process of technological and digital transformation by creating or consolidating skills in the enabling technologies necessary to implement the 4.0 development.

TAX CREDIT FOR INVESTMENTS IN CAPITAL GOODS



Tax credit to support investments in new capital goods for the technological and digital transformation of enterprises.

R&D TAX CREDIT, TECHNOLOGICAL INNOVATION, DESIGN AND AESTHETIC CONCEPTION



Tax credit to support the competitiveness of enterprises by stimulating investments in R&D, technological innovation (also in the context of the 4.0 development and circular economy) Design and aesthetic concept.





FINANCING TO SME'S FOR NON-PAYMENT



Interest-free loans to small and medium-sized enterprises and professionals who are victims of non-payment.

TAX CREDIT FOR INVESTMENTS IN THE MEZZOGIORNO - NATIONAL OPERATIONAL PROGRAMME 'ENTERPRISES AND COMPETITIVENESS



Tax credit for purchasing of goods for production facilities located in the regions of the South of Italy.

DEVELOPMENT CONTRACTS



Support for large-scale strategic and innovative productive investment programmes





NATIONAL INNOVATION FUND



The main national venture capital intervention aimed at supporting the innovative growth of Italian companies.

The NIF has a financial pool of public resources, used, together with private resources, to invest, directly and indirectly, in the capital of companies with high innovation potential.

The available public resources amount is 310 million euros, delivered by so called 'MiSE Co-investment Fund'. It is managed by CDP Venture Capital S.p.A., an asset management company.





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ZES - SPECIAL ECONOMIC ZONE



The ZES, **Campania's Special Economic Zone**, according to the Regional Strategic Plan, **covers 37 of the 550 municipalities in the region**, an area populated by **2,043,800 inhabitants** (35% of the regional population), made up of **26 'strategic' areas** where there are production facilities, ports, interports, industrial development areas (ASI), and PIP areas.



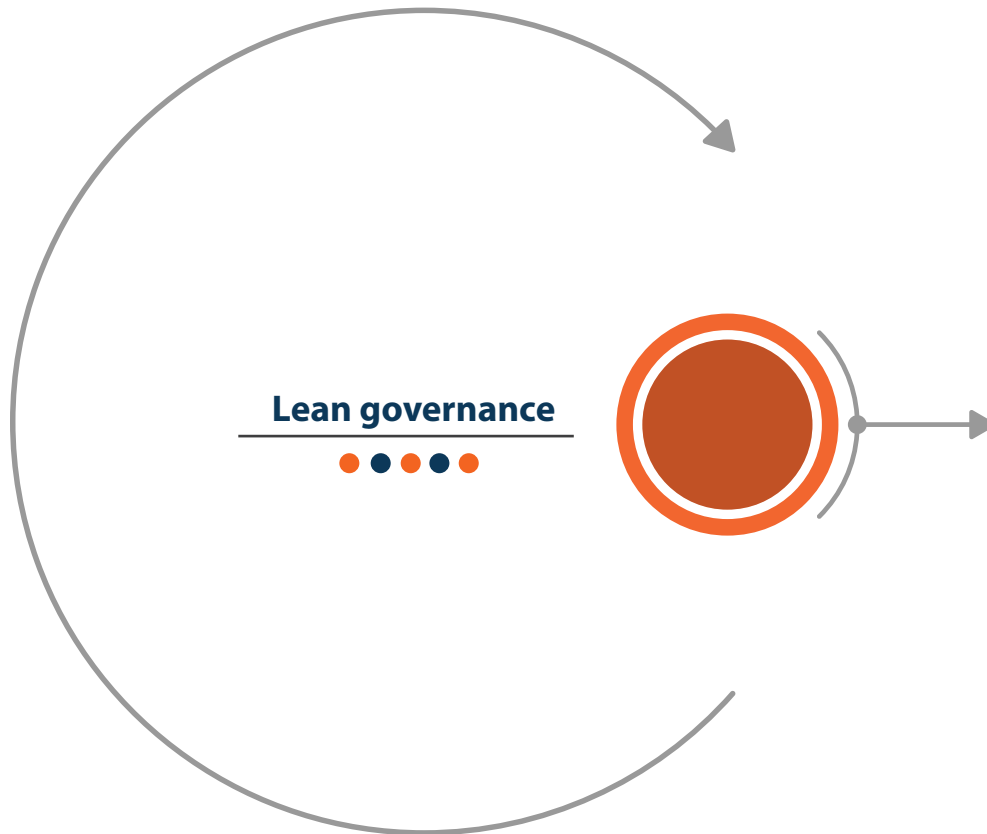


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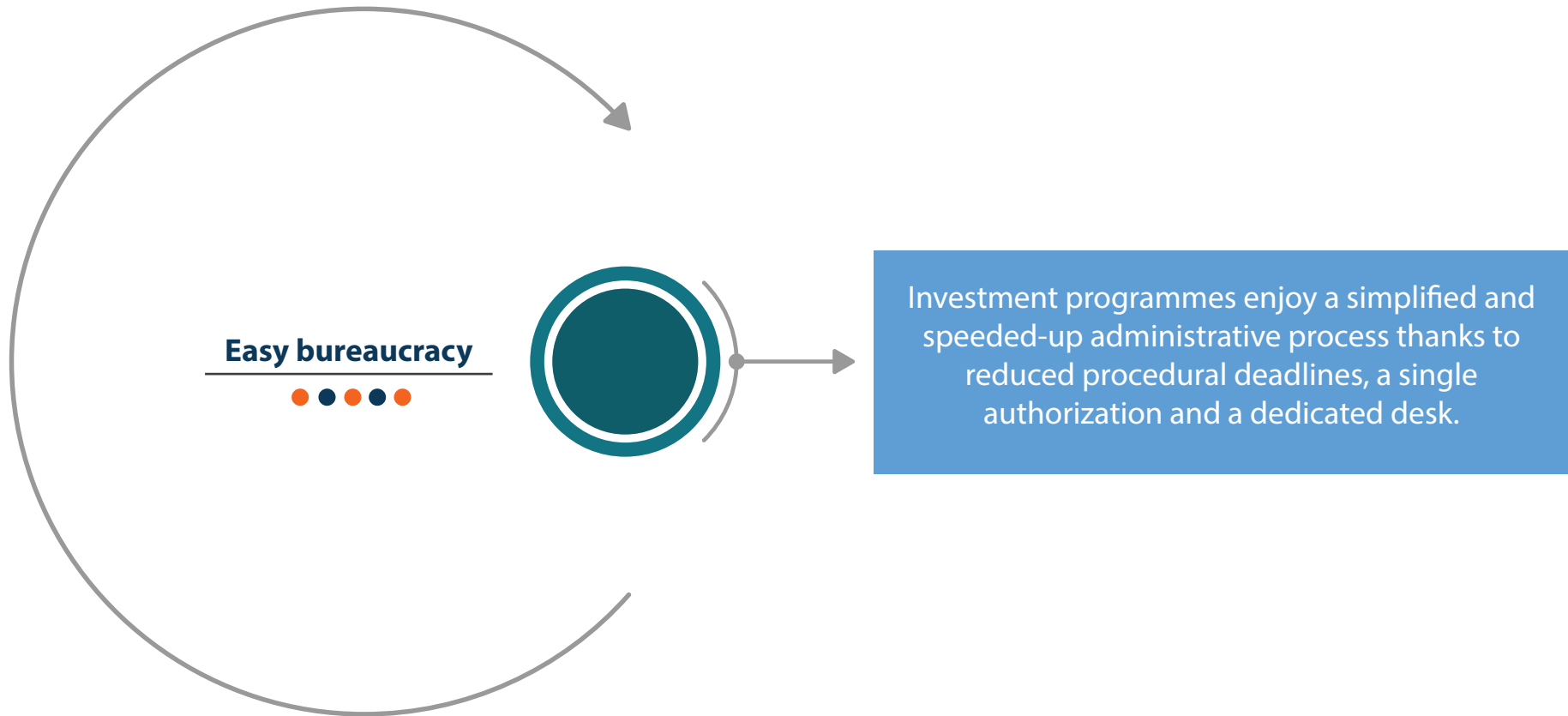
BENEFITS SETTLEMENT IN ZES

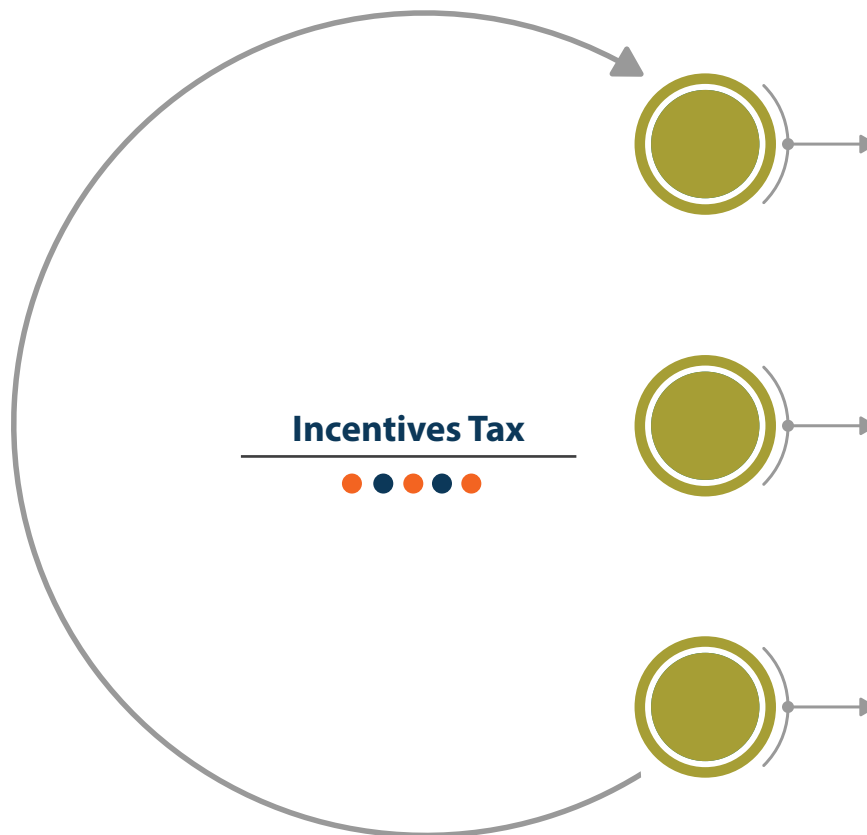




The ZES is managed by an Extraordinary Commissioner with special powers as the main interlocutor for investments.







25% credit of the investment (productive and real estate), for large companies, 35 per cent for medium-sized companies and 45 per cent for small companies, up to EUR 100 million for productive investments and investments in real estate, (also through leasing contracts);

Income tax for activity in ZES reduced by 50%, starting from the tax period in which a new activity is undertaken and for the following six tax periods;

Partial contribution exemption for private sector employers for the period 2021-2029. The relief is 30% of social security contributions payable until 31 December 2025; 20% of social security contributions payable for the years 2026 and 2027; 10% of social security contributions payable for the years 2028 and 2029.





TRAINING AND INNOVATION FOR THE SUPPLY CHAIN IN CAMPANIA





ITALIAN LEATHER RESEARCH INSTITUTE / EXPERIMENTAL STATION FOR THE LEATHER AND TANNING INDUSTRY



A national research organisation of the Chambers of Commerce of Naples, Pisa and Vicenza, with registered office in Naples, which has been operating since 1885 to support all Italian companies in the tanning sector with research and development, training, product and process certification, analysis, controls and consultancy activities.

It develops and promotes process, product and service innovation in the tanning industry in order to improve its international competitiveness in terms of production quality, technological development and environmental sustainability, to the benefit of the entire supply chain and the main target markets:





SOUTH ITALIAN FASHION (SI FASHION) CONSORTIUM



Established in Salerno, with the aim of creating a network of enterprises involving the best micro and small fashion companies from eight strategic southern regions. Abruzzo, Basilicata, Calabria, Campania, Molise, Apulia, Sardinia and Sicily, also for participation in international trade fairs and shows, The Consortium works on innovation and sustainable production with green raw materials, communication marketing, not only digitisation of processes but also communication, internationalisation



SOUTH ITALIAN FASHION



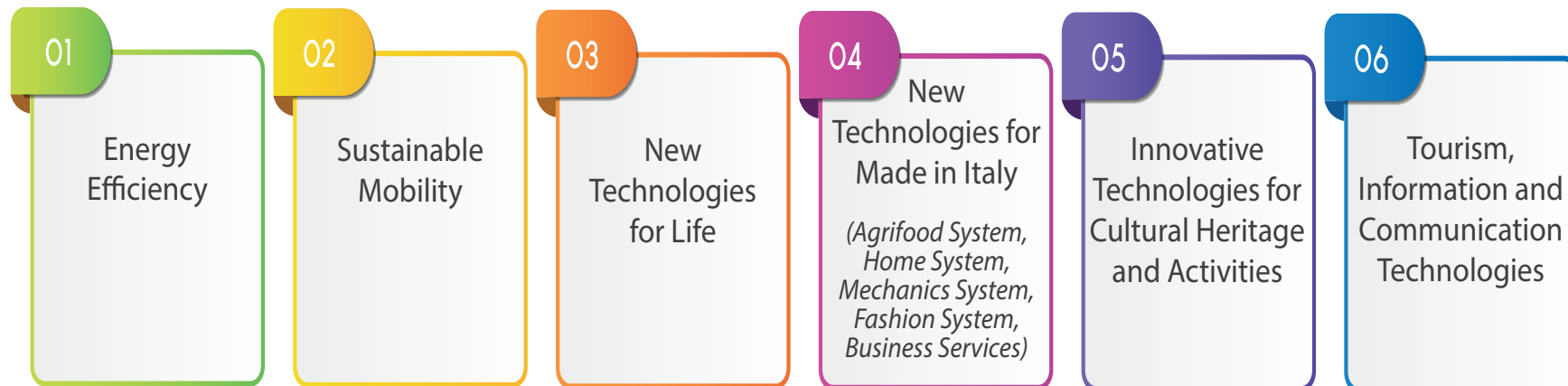


ITS - HIGHER TECHNICAL INSTITUTES



ITSs have a strategy based on the connection between classroom training and work experience in companies that can be carried out as apprenticeships. The topics covered by the training offered by the ITS are built through a shared planning by all the stakeholders (companies, universities/scientific and technological research centres, local authorities, etc.) with the aim of providing students with highly specialised skills that are immediately spendable in the world of work and, at the same time, a response to their need for specialised figures to be included in company processes.

Six are the technological areas of the ITS training offer:



In Naples we find the Campania Moda Technical High School and the Isabella D'Este Caracciolo Institute





UNIVERSITY-LEVEL TRAINING OFFER



The Università degli Studi di Caserta 'Luigi Vanvitelli' offers the Degree Course in Fashion Design (International Degree awarded on a double degree basis with the Okan University of Istanbul/Turkey), which prepares design technicians able to follow a product from the conception phase to the production phase.

In particular, the graduate is expected to promote innovative processes within fashion-oriented companies, expressing competence in all the product design declinations of the fashion industry.

Right from the first year of the course, students have direct contact with design-oriented companies made in Italy, for the design of accessories, textile design, brand design, interior design and space design for fashion, packaging design, trend design, design for cosmetics and goldsmithing design.

Officina Vanvitelli

Created in 2019 within the Department of Architecture and Industrial Design (University of Campania "Luigi Vanvitelli"), it is based in Caserta, at the Monumental Complex of the Belvedere of San Leucio.

It is a space for experimentation and innovation, a creative and research ecosystem for Made in Italy, a meeting place of minds, cultures and different skills for fashion and design in Campania.



The University of Naples "Parthenope" offers the Master Degree Course in "Fashion, Art and Food Management", an innovative course, delivered entirely in English, unique in Italy and worldwide.

The course is oriented towards the sectors of excellence of Made in Italy, which it studies transversally, grasping similarities of competitive modes and critical success factors, mutual sources of inspiration and conditioning, and relevant synergic potential.

It trains entrepreneurs, administrators, managers and consultants responsible for strategic and operational processes in companies operating in the Fashion Art and Food sectors and in related sectors, such as tourism, as well as in any business strongly oriented towards creativity, innovation, quality and internationalisation.

The Fashion Academy, Institute of Universal Art and Design, offers in Naples various courses of varying duration and level (three-year, master, short courses) ranging from technical drawing for Fashion to accessory design, to the use of the most advanced software, in Fashion Design, Communication Design, Interior Design.

