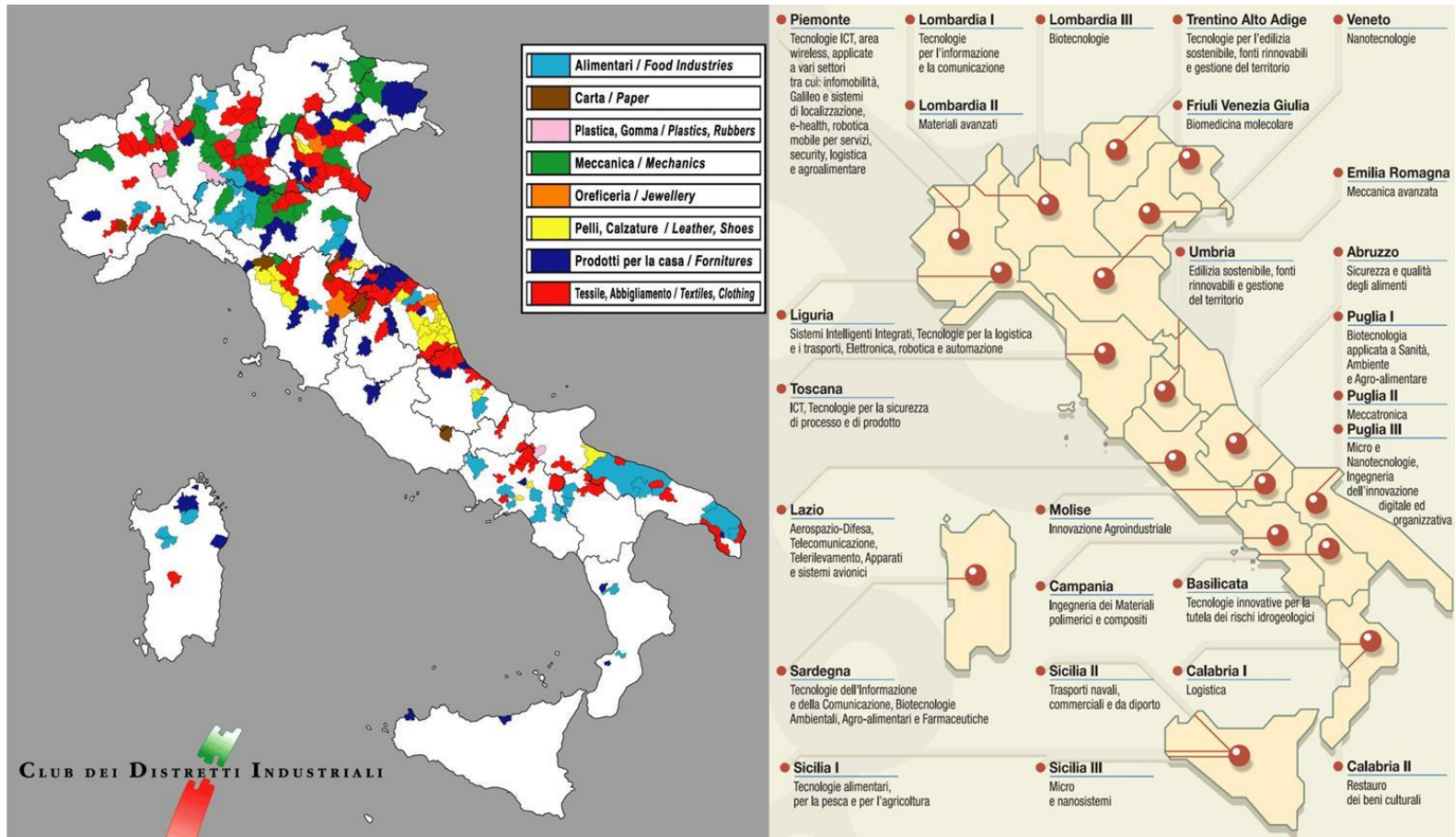


ITALY IS THE LAND OF THE INDUSTRIAL DISTRICTS

MORE THEN 150 INDUSTRIAL DISTRICTS



THE DEFINITION OF INDUSTRIAL DISTRICT

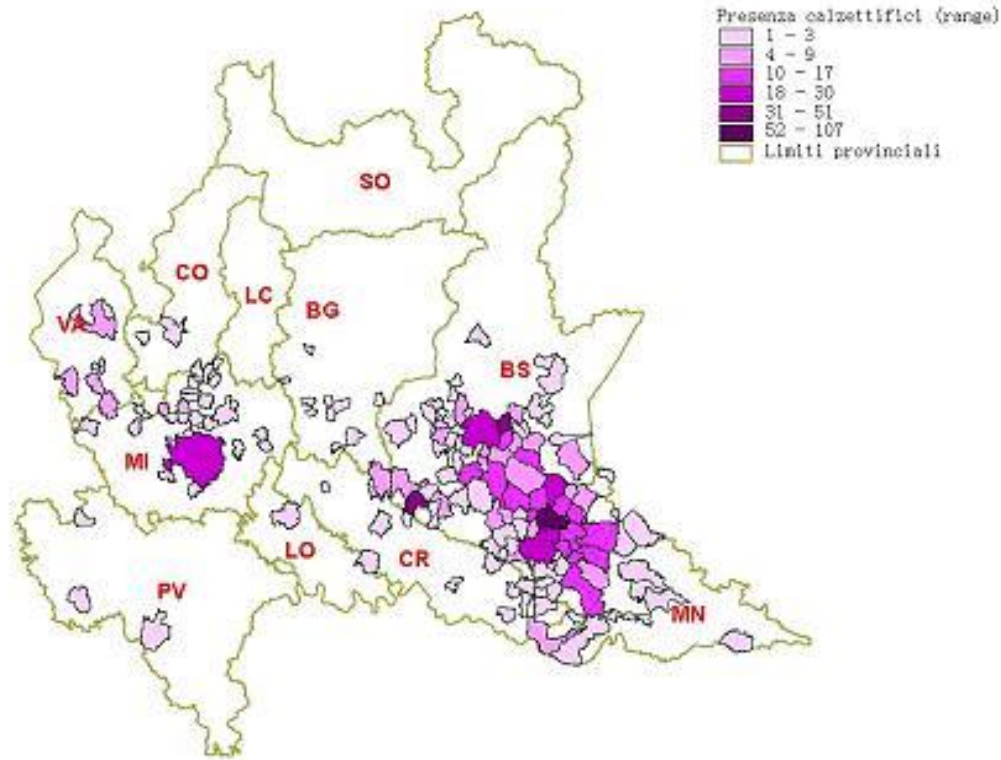
TRADITIONAL DEFINITION OF INDUSTRIAL DISTRICT :

«INDUSTRIAL CONGLOMERATION, SITUATED IN LIMITED TERRITORIAL AREA AND HISTORICALLY STATED, SPECIALIZED IN ONE OR MORE PHASES OF A PRODUCTION CHAIN»

DISTRICT N° 6 HOSIERY OF CASTEL GOFFREDO RECOGNIZED BY REGIONAL LAW 5/1/2001 N° 1 - 16/3/2001

15 VILLAGES

CASTEL GOFFREDO, CASALOLDO, ASOLA, GUIDIZZOLO, MEDOLE, SOLFERINO, CASALMORO, CASALROMANO, CASTIGLIONE D/S, CERESARA, ACQUAFREDDA, VISANO, REMEDELLO, PIUBEGA, ISOLA DOVARESE



CASTEL GOFFREDO DISTRICT

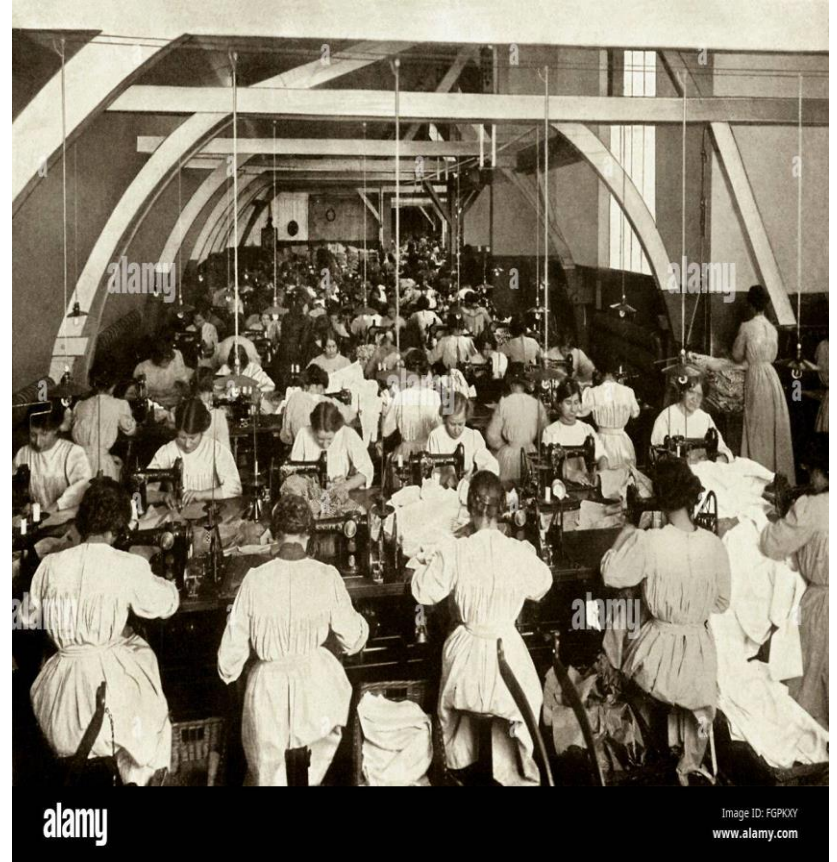
South est of Lombardy region

THE BEGINNING : HOSIERY FACTORY NO.E.MI

ESTABLISHED IN 1925 BY DELFINO EOLI, ORESTE EOLI AND ACHILLE NODARI
AT THE END OF 30° NOEMI HAD AROUND 700 EMPLOYEES
FROM THE 50° NOEMI LIVED A SLOW DECLINE
THE DECLINE : NO NEW TECHNOLOGY AND GENERATIONAL RENEWAL



CASTEL GOFFREDO DISTRICT A LONG HISTORY OF MANUFACTURING



THE HISTORICAL PASSAGES OF THE DISTRICT

BRIEF SUMMARY

NOEMI : THE INCUBATOR

THE SPIN OFF

THE ARTISANAL WORKSHOP

THE SPONTANEOUS STRUCTURING OF THE SUPPLY CHAIN

THE BRESCIAN TEXTILE MECHANICAL POLE

FROM THE ARTISANAL WORKSHOP TO THE INDUSTRY

THE HISTORICAL PASSAGES OF THE DISTRICT

BRIEF SUMMARY

THE VERTICAL INTERNALIZATION OF THE PRODUCTION PHASES

THE BIRTH OF THE BRANDS

THE BIRTH OF THE STOREBRAND CHAINS

THE PRODUCTIVE RELOCATION IN OTHER COUNTRIES

THE ADVENT OF NEW PRODUCT CATEGORIES

PRODUCTION PHASES OF HOSIERY

IN CASTELGOFFREDO THE WHOLE SUPPLY CHAIN

TEXTURIZATION, SPINNING AND COVERING OF THE YEARN

WEAVING

SEWING

DYEING AND FINISHING

PACKAGING

SALE AND MARKETING

THE CULTURAL COMPETITIVE ADVANTAGES

A HIGH SENSE OF BELONGING TO THE SAME COMMUNITY

A MARKED CULTURAL APTITUDE FOR WORK

A STRONG SENSE OF FAMILY

A DEEPLY INDIVIDUALIST AND ENTREPRISE SPIRIT

THE ORIGIN FROM AN AGRICULTURAL CULTURE

THE COMMUNICATION IN A COMMON LANGUAGE (LOCAL DIALECT)

THE ECONOMIC COMPETITIVE ADVANTAGES

A LOW IMPORTANCE OF LABOR INDIRECT COSTS

THE AVAILABILITY OF CAPITALS DERIVED FROM AGRICULTURE

THE SYNERGY WITH THE MECHANICAL POLE OF BRESCIA

THE HIGH INTERCHANGING OF WORKERS BETWEEN COMPANIES

A HIGH AND SPEED DIFFUSION OF TECHNOLOGICAL KNOW-HOW

A CONTINUOUS INCREMENTAL INNOVATING PROCESSES OF PRODUCTION

PRODUCT CATEGORIES OF THE DISTRICT



WOMAN AND CHILD HOSIERY

(CLASSIC,
FASHION,
SUPPORT AND
MEDICAL)



SEAMLESS UNDERWEAR



SEAMLESS OUTDOOR GARMENTS



TECHNICAL SPORT GARMENTS



MAN SOCKS



DISTRICT FIGURES

YEAR 2021

SOURCE: UNIBS

CATEGORY	2021
N° OF COMPANIES	320
TOTAL TURNOVER	1.120.000.000 €
N° OF EMPLOYEES - CORE BUSINESS	6.400
N° EMPLOYEES – WITH SATELLITE ACTIVITIES	10.000
EXPORT PERCENTAGE	65%

MAIN EXPORT MARKETS OF THE DISTRICT

TIGHTS

YEAR 2021 - TURNOVER DATAS (€)

SOURCE: ISTAT CENTRAL STATISTICS OFFICE in €

EXCLUDING EXPORT TO COUNTRIES OF THE RELOCATION (SERBIA, CROATIA, POLAND, SLOVAKIA, ROMANIA)

COUNTRY	EXPORT PERCENTAGE WEIGHT
GERMANY	11,13%
UK	10,33%
FRANCE	9,80%
SPAIN	5,55%
NETHERLAN	5,38%
SWEDEN	3,44%
BELGIUM	3,89%
SWITZERLAND	2,73%

FAST FASHION IS OUT OF FASHION

THE EUROPEAN STRATEGY FOR SUSTAINABLE TEXTILE

APPROVED BY EUROPEAN COMMISSION ON 30/03/2022

WITHIN THE 2030 WILL HAVE TO BE COMPLETED



14 Aprile 2023

SUPPLY CHAIN OF TEXTILE INDUSTRY IS GLOBAL

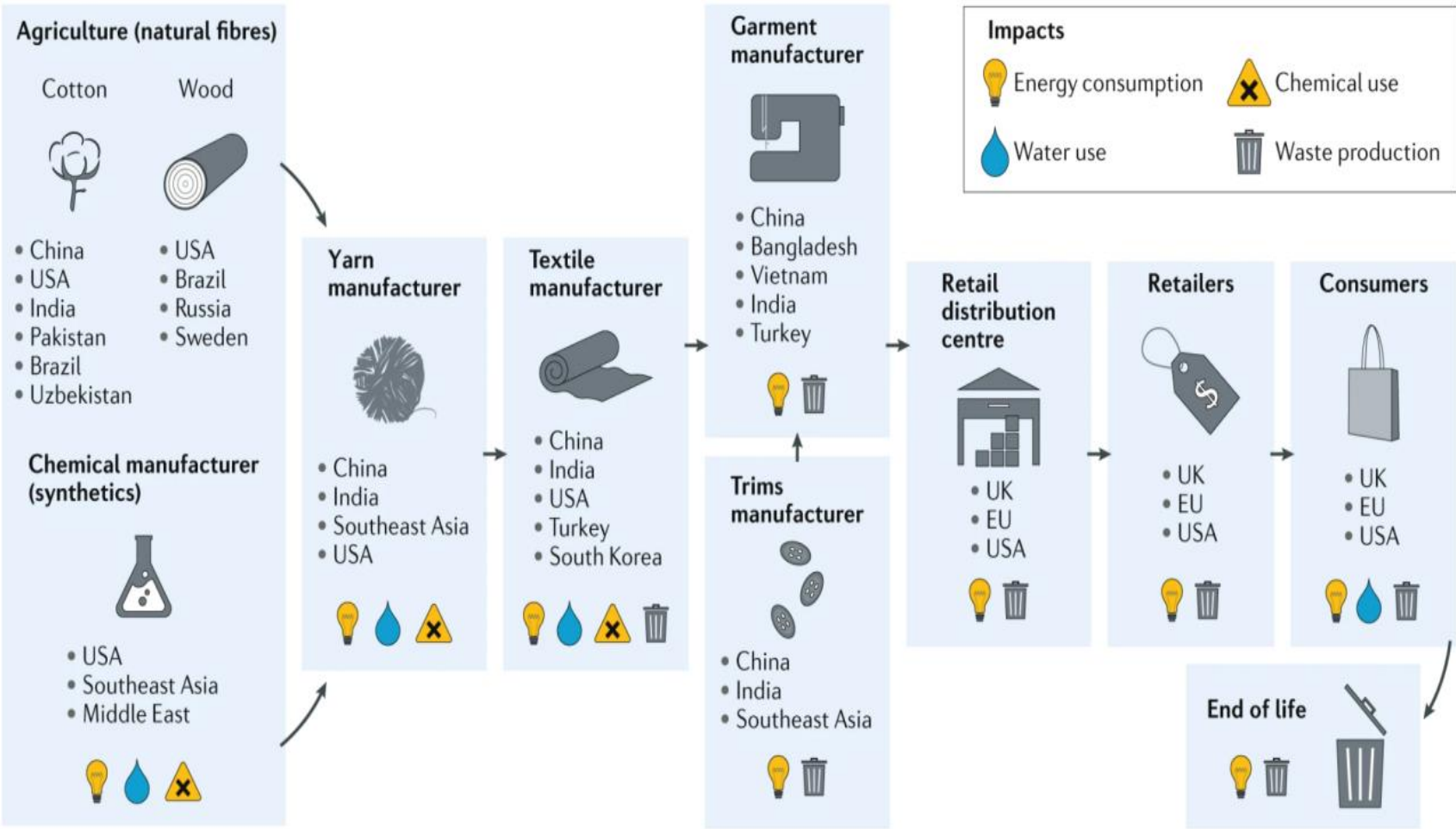
THE FASHION TEXTILE INDUSTRY IS BASED ON A HIGHLY FRAGMENTED SUPPLY CHAIN ALSO FROM DIFFERENT GEOGRAPHICAL BORDERS. HE INCUBATOR

AFTER THE RANA PLAZA DISASTER IN BANGLADESH, MANY BRANDS TOOK SEVERAL WEEKS BEFORE UNDERSTANDING WHY THEIR SIGNATURE WAS PRESENT ON THE GARMENTS BURIED UNDER THE RUBBISH

A LARGE NUMBER OF PRODUCER AND RETAILERS DO NOT THEIR OWN MANUFACTURING CHAIN AND RESTS TO THIRD PARTIES WHO OFTEN AND LIKELY SUBCONTRACT IN THEIR OWN

SOMETIMES A COMPANY MAY COUNT ON ONE THOUSAND OR TWO THOUSAND SUPPLIERS BUT THE REALITY IS THAT OFTEN IT KNOWS IT HAS FROM 20 TO 50 MAXIMUM

SUPPLY CHAIN OF TEXTILE INDUSTRY IS GLOBAL



GLOBAL IMPACT OF THE TEXTIL INDUSTRY

TEXTILE INDUSTRY REPRESENTS THE SECOND MOST POLLUTING INDUSTRY AFTER OIL DUE, IN PARTICULAR WAY, TO THE USE OF PESTICIDES, FORMALDEHYDE AND CARCINOGENIC AGENTS

THE FASHION TEXTILE SECTOR EMITS MORE THAN ONE BILLION TONNES OF GREENHOUSE GAS EVERY YEAR, REPRESENTING 2% OF TOTAL EMISSIONS

THE TEXTILE FASHION INDUSTRY IS ONE OF THE HIGHEST ELECTRICITY CONSUMER IN THE WORLD, BECAUSE IT USE VERY LOT OF NO-RENEWABLE ENERGY SOURCES AND MAKES LITTLE USE OF RENEWABLE ENERGY

IN CHINA, TEXTILE PRODUCTION IS MAINLY POWERED BY CHARCOAL, THUS INCREASING ITS ECOLOGICAL FOOTPRINT BY 40% COMPARED TO ITEMS PRODUCED IN EUROPE.

GLOBAL IMPACT OF THE TEXTIL INDUSTRY

THE TEXTILE INDUSTRY IS RESPONSIBLE FOR THE DISPERSION IN THE SEA OF 0.5 MILLION TONNES OF SYNTHETIC FIBERS EVERY YEAR, THAT IS 35% OF THE PRIMARY MICROPLASTICS RELEASED INTO THE ENVIRONMENT

MOST MICROLASTICS COME FROM THE WASHING OF CLOTHING GARMENTS IN SYNTHETIC MATERIAL SUCH AS ACRYLIC AND POLYESTER (PRESENT IN JEANS, LEGGINGS AND OTHER CHEAP CLOTHES).

TO PRODUCE THE CLOTHES, TEXTILE INDUSTRY USES A LOT OF WATER, ABOUT 4% OF THE DRINKING WATER AVAILABLE IN THE WORLD

20% OF THE POLLUTION OF THE PLANET'S WATERS ARISES FROM THE TREATMENT AND DYEING OF TEXTILE PRODUCTS (NATURAL SCIENCE, FORBES)

NEGATIVE IMPACT AREAS OF THE APPAREL INDUSTRY

RESOURCES DEPLETION



CLIMATE CHANGE



ANIMAL SUFFERING



WATER POLLUTION



FOOD INSECURITY



AIR POLLUTION



HABITAT DESTRUCTION



HUMAN RIGHTS ABUSES



FAST FASHION IS THE CORE OF THE PROBLEM

DISTRIBUTION AND RETAIL SYSTEM ARE CONSTANTLY OFFERING NEW ITEMS TO BUY

ZARA : 2 COLLECTION PRESENTED IN 2000, 5 IN 2005 AND 24 NEW IN 2020

H&M : BETWEEN 12 AND 16 NEW COLLECION PRESENTED IN 2020

CLOTHING CHARACTERIZED BY MEDIUM-LOW QUALITY CLOTHES AT VERY COMPETITIVE PRICES, AND BY CONTINUOUS AVAILABILITY AND RENEWAL OF THE COLLECTIONS

CONSUMERS CONSIDER CHEAP CLOTHING GARMENTS AS DETERIORABLE TO BE THROW AWAY AFTER WEARING THEM ONLY SEVEN OR EIGHT TIMES

AIM TO EXPLOIT THE COMPULSIVENESS PURCHASING ATTITUDE BY FOCUSING ON THE ALWAYS NEW AND FAST NEW TRENDS

IN FAST FASHION LACK OF TRANSPARENCY

FASHION TRANSPARENCY INDEX 2022

LESS THAN HALF OF THE COMPANIES GIVE SUFFICIENT INFORMATION ABOUT THEIR PRODUCTION PLANTS

ONLY 24% OF COMPANIES GIVE SATISFACTORY INFORMATION ABOUT THEIR PRODUCTION PROCESS

JUST 11% OF SHARES PROVIDE INFORMATION ABOUT THEIR SUPPLIERS OF RAW MATERIALS

JUST 30% OF COMPANIES HAVE DECLARED ITS COMMITMENT TO ELIMINATE THE USE OF TOXIC CHEMICALS IN PRODUCTION AND DYEING

MAIN NEGATIVE IMPACTS OF FAST FASHION

EXPLOITATION OF THE WORKER

ENVIRONMENTAL DAMAGES (EXPECIALLY COTTON COLTIVATION)

OVERPRODUCTION OF CLOTHING

GENERATION OF HUGE QUANTITIES OF WASTE

CONSUMER HEALTH PROBLEMS (USE OF TOXIC CHEMICALS)

THE EUROPEAN STRATEGY FOR SUSTAINABLE TEXTILE

APPROVED BY EUROPEAN COMMISSION ON 30/03/2022

WITHIN THE 2030 WILL HAVE TO BE COMPLETED

ECODESIGN FOR SUSTAINABLE PRODUCTS REGULATION

STOP THE DESTRUCTION OF UNSOLD GARMENTS

FIGHTING POLLUTION BY MICROPLASTICS

THE INTRODUCTION OF THE DIGITAL PRODUCT PASSPORT

STOP TO GREEN CLAIMS (GREEN WASHING AND GREENHUSHING)

EPR AND RECYCLING OF TEXTILE WASTE (RESPONSIBILITY OF PRODUCERS)

ECODESIGN NON MORE INCINERATOR

EU Strategy for Sustainable and Circular Textiles

1. ECODESIGN

La Commissione UE svilupperà requisiti obbligatori di ecodesign a favore della durabilità, riparabilità e riciclabilità dei prodotti. Sì al monofibra e no alle bottiglie in PET riciclato nei vestiti!

WRD

EU Strategy for Sustainable and Circular Textiles

2. NIENTE PIÙ INCENERITORE

Divieto di distruzione dei prodotti invenduti e obbligo per i brand di pubblicare la quantità di materiale tessile distrutto.

WRD

STOP MICRO PLASTICS TRANSPARENCY (STOP GREENHUSHING)

EU Strategy for Sustainable and Circular Textiles

3. BASTA MICRO PLASTICHE IN NATURA

Per diminuire la dispersione di microplastiche saranno introdotte linee guida al design senza fibre sintetiche e nuove tecnologie per il filtraggio in fase di lavaggio.

WRD

EU Strategy for Sustainable and Circular Textiles

4. TRASPARENZA

I brand dovranno pubblicare informazioni su provenienza, modalità produttiva e ingredienti di ogni capo di abbigliamento.

WRD

STOP GREENWASHING EPR

EU Strategy for Sustainable and Circular Textiles

5. STOP GREENWASHING

- Green? Climate-positive entro il 2030? Solo se scientificamente provato!
- I brand dovranno indicare la durata dei loro capi e offrire un servizio per la loro riparazione.

WRD

EU Strategy for Sustainable and Circular Textiles

6. CHI SPORCA PAGA

EPR (EXTENDED PRODUCT RESPONSIBILITY)

La responsabilità di un brand non termina con la vendita!

I brand dovranno pagare una tassa per sostenere la gestione del fine vita dei propri prodotti.

WRD

FAST FASHION OUT OF FASHION POWER TO R&D

EU Strategy for Sustainable and Circular Textiles

7. FAST FASHION? OUT OF FASHION

I brand dovranno ridurre il numero di collezioni annue e sviluppare servizi fondati su riuso, riparazione e rivendita.



EU Strategy for Sustainable and Circular Textiles

8. POTERE ALLA RICERCA!

Sostegno alla ricerca e allo sviluppo di tecnologie per il riciclo da-fibra-a-fibra e allo sviluppo di materiali bio-based.



SOCIAL JUSTICE

STOP TO TEXTILE LANDFILLS

EU Strategy for Sustainable and Circular Textiles

9. NESSUNA SOSTENIBILITÀ SENZA GIUSTIZIA SOCIALE

I prodotti realizzati in condizioni avverse ai diritti umani fondamentali non saranno più ammessi nel mercato dell'UE.

WRD

EU Strategy for Sustainable and Circular Textiles

10. I PANNI SPORCHI SI LAVANO IN CASA

L'esportazione di rifiuti tessili avverrà solo verso paesi che dimostrino la volontà e la capacità di gestirli.

WRD

STOP THE DESTRUCTION OF UNSOLD GARMENTS

THE COMMISSION PROPOSES TO INTRODUCE A **TRANSPARENCY OBLIGATION** FOR COMPANIES, PRODUCERS AND BRANDS

THE NUMBER OF REJECTED PRODUCTS DESTROYED AND THEIR ACTION IN TERMS OF PREPARATION FOR RE-USE, RECYCLING, INCINERATION OR LANDFILLING **SHOULD BE PUBLISHED**

THE PROBLEM OF OVERPRODUCTION WILL ALSO BE MANAGED WITH THE HELP OF NEW TECHNOLOGIES THAT WILL ALLOW TO OPTIMIZE THE LIFE CYCLE OF GARMENTS FROM PRODUCTION TO THEIR END OF LIFE.

THE EXPORT OF TEXTILE PRODUCTS WILL TAKE PLACE ONLY TO COUNTRIES THAT SHOW THEY KNOW HOW TO MANAGE THEM

EPR AND RECYCLING OF TEXTILE WASTE

A **BRAND'S RESPONSIBILITY** DOES NOT END WITH THE SALE. BRANDS WILL HANDLE THE MANAGEMENT OF **THE END OF LIFE OF THE PRODUCTS**

IT SHOULD IMPROVE THE SEPARATE COLLECTION OF WASTE AND ITS SUBSEQUENT MANAGEMENT IN LINE WITH **THE WASTE HIERARCHY.**

THE MAIN OBJECTIVE WILL BE TO CREATE A SYSTEM FOR COLLECTION, SORTING, RE-USE, PREPARING FOR RE-USE AND RECYCLING

INCENTIVES WILL BE INTRODUCED FOR MANUFACTURERS AND **BRANDS TO ENSURE** THAT THEIR PRODUCTS ARE DESIGNED IN COMPLIANCE WITH **THE PRINCIPLES OF CIRCULARITY.**

MAIN OBSTACLES TO A CIRCULAR ECONOMY IN TEXTIL

THE LOW QUALITY OF THE YARNS USED IN A LARGE PARTE OF THE PRODUCTION THAT MAKES THEM NOT RECOVERABLE

THE LITTLE KNOWLEDGE OR SENSITIVITY, IN MANY COUNTRIES OF THE WORLD OR IN SOME AGE BANDS, OF THE IMPACT ON THE ENVIRONMENT OF THE PRODUCTION PROCESSES AND THE VIOLATION OF THE RIGHTS OF WORKERS

THE INSUFFICIENT PROGRESS OF SCIENTIFIC RESEARCH AND TECHNOLOGY THAT OFTEN EVOLVES MORE SLOWLY THAN THE ASPIRATIONS OF SUSTAINABILITY

THE SEDIMENTED CULTURE OVER THE YEARS BY CONSUMERS AND THE BI-POLAR ATTITUDE OF MILLENIALS AND Z GENERATIONS

WATER IMPACT

20%

of water pollution comes from treating and dyeing textiles.¹

The fashion & textiles industry is a major polluter of water at all stages of the value chain, from the agricultural runoff from cotton fields causing algal blooms that choke rivers, to the dyeing process releasing a cocktail of toxic chemicals and the washing of clothes releasing microplastics.²

WATER CONSUMPTION



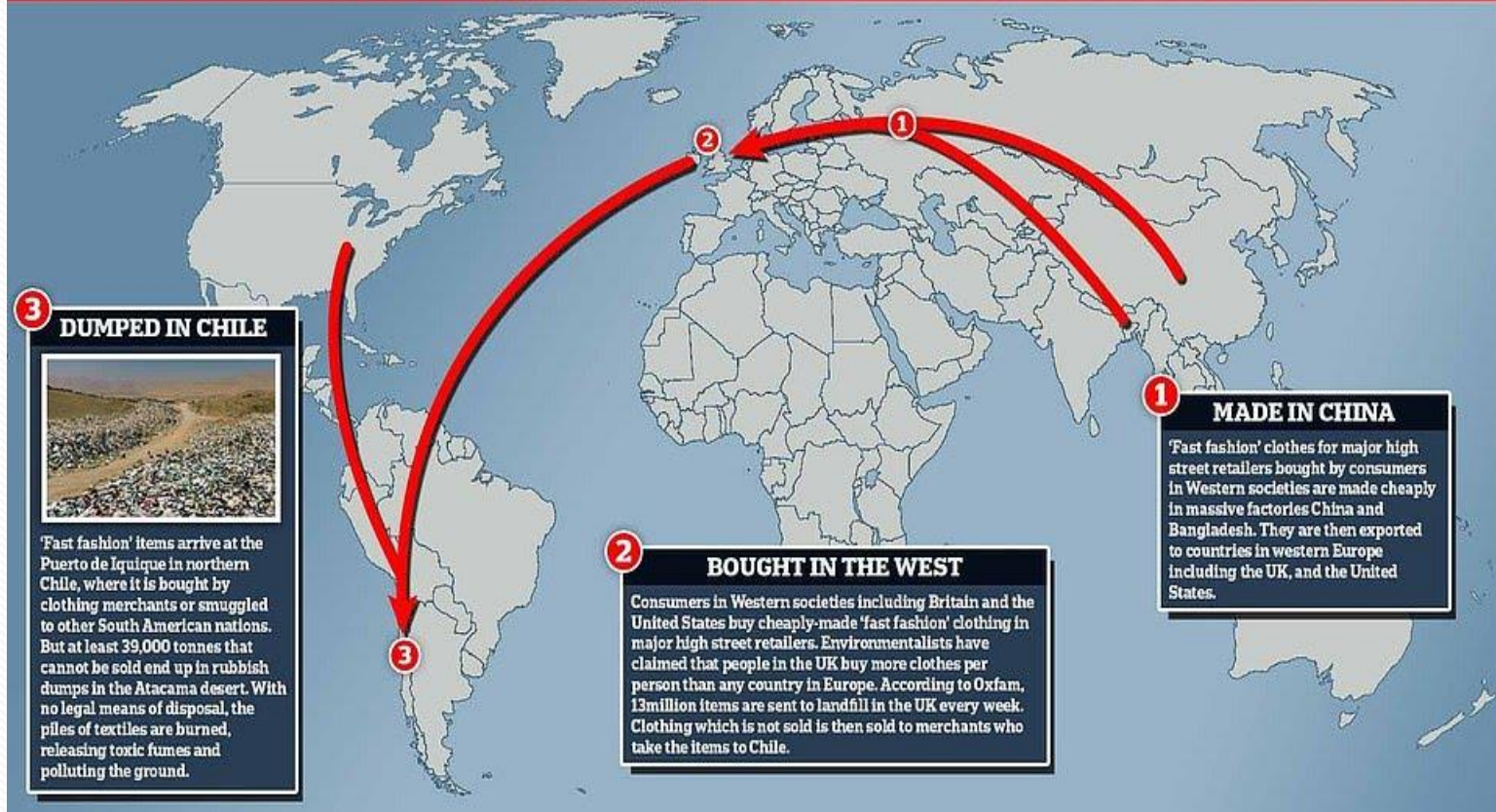
**2,700 liters of water is
needed to grow cotton
enough to produce just
one cotton T-shirt**

#TUESDAYTRIVIA

THE WAY OF FAST FASHION WASTE

FROM CHINA TO EUROPE AND USA TO CHILE, INDIA, AFRICA

'MADE IN CHINA AND DUMPED IN CHILE': HOW UK CONSUMERS FUEL 'FAST FASHION' SCANDAL



THE LANDFILLS OF FAST FASHION

ACCRA (GHANA) 2021



THE LANDFILLS OF FAST FASHION

INDIA 2021



THE LANDFILS OF FAST FASHION

ATACAMA DESERT (CHILE) 2021



THE LANDFILLS OF FAST FASHION

KENIA 2021



CHEMICAL IMPACT

CHINESE RIVER (2021)



Martina Schiuma | Head of Sustainability



There isn't a **sustainable product** without an **integrated supply chain traceability system**

Control Union India scandal: organic cotton used to make garments is not organic

